

# 2009 STANDARD ANNUAL REPORTING

## Organization Reports



movement advancement project ▶

October 2009

## Movement Advancement Project

The Movement Advancement Project (MAP) is an independent, intellectual resource for LGBT organization executives and donors, funded by a small number of committed, long-term donors to the LGBT civil rights movement. MAP's mission is to speed achievement of full social and political equality for LGBT people by providing donors and organizations with strategic information, insights and analyses to help them increase and align resources for highest impact. In sum, MAP's research is designed to stimulate additional contributions to the LGBT movement, as well as additional productivity from those contributions.

## 2009 Standard Annual Reporting

The 2009 Standard Annual Reporting project provides a comprehensive and standardized look at the LGBT movement's finances across 54 major LGBT organizations and 21 of their largest institutional funders. The project aims to educate both new and longstanding LGBT movement donors and activists, and to encourage and sustain their commitment to the movement. MAP staff members assist organizations and foundations with submitting their data for the SAR program to ensure accuracy and standardization.

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### Contact Information

#### **LGBT Movement Advancement Project (MAP)**

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Center on Halsted	MassEquality
CenterLink	National Black Justice Coalition (NBJC)
COLAGE	National Center for Lesbian Rights (NCLR)
Compass, Inc.	National Center for Transgender Equality (NCTE)
Council for Global Equality	National Stonewall Democrats
Empire State Pride Agenda	National Youth Advocacy Coalition (NYAC)
Equality California	NYC Gay and Lesbian Anti-Violence Project
Equality Federation	Out & Equal Workplace Advocates
Equality Forum	The Palm Center
Family Equality Council	PFLAG
Freedom to Marry	Point Foundation
Gay & Lesbian Advocates & Defenders (GLAD)	Resource Center of Dallas
Gay & Lesbian Alliance Against Defamation (GLAAD)	The San Diego LGBT Community Center
Gay & Lesbian Victory Fund and Leadership Institute	San Francisco LGBT Community Center
Gay Community Center of Richmond	Servicemembers Legal Defense Network (SLDN)
Gay, Lesbian and Straight Education Network (GLSEN)	Services & Advocacy for GLBT Elders (SAGE)
Gay-Straight Alliance Network	Soulforce
The GLBT Community Center of Colorado	Sylvia Rivera Law Project (SRLP)
GroundSpark	The Task Force
Human Rights Campaign and Foundation (HRC)	Transgender Law Center
Immigration Equality	The Trevor Project
In The Life Media, Inc.	The Williams Institute
	Wingspan

### 2. SAR Quick User's Guide



**2009**

**ACLU LGBT & AIDS Project**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1986	National
<i>Fiscal Year</i>	<i>Type</i>
Apr - Mar	Legal
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$2,982,443	19
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

The creation of a society in which LGBT people and people with HIV enjoy the basic rights of equality, privacy and personal autonomy, and freedom of expression and association. This means an America where people can live openly without discrimination; where there's respect for our identities, relationships, and families; and where there's fair treatment in employment, schools, housing, public places, health care, and government programs.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

Note that much of the work below and in 1-year sections is in partnership with ACLU affiliates and/or other organizations; also that some litigation is amicus, rather than direct. Our HIV plans and work have not been included due to space limitations.

- Significantly Advance 10/10/10/20 Winning Marriage Plan**
  - Litigate* 5-6 marriage or civil union (CU) cases (win 3+, incl. 1 marriage); 3+ cases to limit harm from existing anti-marriage amendments or invalidate them (win 1+); and 2+ cases each for state domestic partnership (DP) benefits and out-of-state marriage recognition (win 1 each)
  - Advocate* to pass marriage, CUs or DPs in 10 state legislatures and key localities (winning in 5+ each); get DP benefits for federal employees; repeal federal DOMA; prevent anti-marriage amendment votes in 4 states
  - Win 1+ anti-marriage vote; repeal 1 anti-gay marriage amendment
- Empower Activists to Achieve Safe Schools and Student Rights**
  - Via litigation or advocacy:* Help 25+ groups of kids/parents/teachers start GSAs and stop 3+ school districts from using parental consent or "abstinence only" policies to close GSAs; get 25+ safe schools policies and good policies for LGBT kids in 2+ youth facilities
  - Litigate* 2+ cases affirming a student's right to control who knows about SO; 3+ federal cases establishing no religious right to opt out of safe schools training or nondiscrimination laws; 5+ cases protecting LGBT student expression (e.g., rainbow signs; Internet) and work administratively on 25+ free expression matters
- Persuade Courts and Public that LGBT People Parent Just as Well as Non-LGBT People**
  - Litigate* 5 cases affirming right of LGBT people to be custodial, foster, or de facto parents or guardians; 3 cases challenging family court orders barring LGBT people from being with their children in partners' presence (win 2)
  - Via litigation or advocacy:* Eliminate 2+ anti-gay foster parenting/adoption laws; prevent enactment of such laws in 5+ states; work to legalize 2nd-parent adoption in 5 states (succeed in 2+)
- Affirm Basic LGBT Equality and Fairness**
  - Litigate* 3+ cases to fight gov't discrimination in states w/o nondiscrimination laws or claims of religious exemption from such laws (succeed in 2)
  - Advocate* to pass trans-inclusive nondiscrimination laws in 12 states (succeed in 5+); to pass trans-inclusive ENDA; and to help get trans-inclusive nondiscrimination protections for federal employees and contractors.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**5. Work for Protections Against Gender Identity (GI) Discrimination**

- *Litigate* 3-5 cases challenging GI discrimination under existing federal law (win 2+); 3-5 cases of gov't denial of trans-specific health care (win 2+); 3 cases of gov't refusal to change ID documents (win 2+); or advocate against GI discrimination in 10 school districts (succeed in 6)
- *Advocate* for GI nondiscrimination "catch-up" bills in 7 states (succeed in 2); to eliminate Medicare/Medicaid trans-health care exclusions; for GI-sensitive policies on federal ID documents; and for APA to correctly classify GI-related matters in next DSM

One-year Key Planned Accomplishments for FY2010

**1. Relationship Recognition (RR)**

- Update *10/10/10/20 Winning Marriage* plan; find best counter to argument that marriage recognition will cause schools to teach homosexuality
- *Litigate* 4 marriage cases, completing 2 and winning 1; challenge to federal DOMAs Sec. 3 (assist GLAD); DP benefits for gov't employees in 2+ states (win 1+); 1 case to limit scope of anti-marriage amendment; or work legislatively in 3 states to recognize out-of-state marriages (succeed in 2)
- *Advocate* to repeal federal DOMA: for marriage laws in 7 states (succeed in 3); for CU/DP laws in 8 states (succeed in 4); to defeat anti-marriage amendments in 5+ states (succeed in 3); for RR by vote in CA, ME, and WA (succeed in 1); w/in administration for DP benefits for federal employees
- *Educate* public by developing additional strategies to get LGBT people to talk to others about what it means to be LGBT

**2. Youth and Schools**

- *Litigate* against efforts to shut down GSAs in 5 school districts (succeed in 4); harassment of LGBT kids in 3 states (succeed in 1+); and attempts in 3 states to remove/severely restrict pro-gay, age-appropriate instructional material (win in 1+)
- *Advocate* for safe schools policies in 5 states/districts (succeed in 2+); for federal nondiscrimination protections; and for right of students to bring same-sex dates to prom in 5 districts (succeed in 4)
- Help students in 5 states to be open about their SO or their support for LGBT rights or to access age-appropriate LGBT information; provide downloadable legal letters for self-help

**3. Parenting**

- *Litigate* to defend trial court decision striking down FL gay adoption ban; challenge AR voter-enacted ban on foster or adoptive parenting by unmarried couples; appeal TN family court rule prohibiting partner of divorced parent from spending night with kids present; for 2nd-parent adoption in 2+ states (succeed in 1); for right of non-biological, non-adoptive LGBT parent to be treated as legal parent in 4+ states (succeed in 2); 1 case to preserve parental rights of gay couples who've adopted jointly out-of-state; defend against WV's attempt to prevent lesbian couple from adopting their foster child
- *Advocate* for repeal of FL gay adoption ban; against anti-LGBT parenting bills in 3 states (succeed in 2+); in 4 states to strengthen parental rights of non-adoptive, non-biological gay parents (succeed in 2+)
- *Educate* public about social science evidence on gay parenting; launch project to persuade media that there are not 2 sides to science on parenting by gay people

**4. Basic Civil Rights**

- *Litigate* 2 cases on religious-based discrimination (win 1+); 2 cases involving job or public accommodations discrimination (win 1+); to defend 9th Circuit ruling for WA service member discharged under DADT
- *Advocate* to pass nondiscrimination laws (with GI protections and narrow religious exemptions) in 15 states (succeed in 3+); to pass ENDA; for nondiscrimination protections for federal contractors and employees
- *Educate* public by developing strategy to persuade of importance of narrow religious exemptions to civil rights laws; activists through 1-day courses on passing LGBT legislation

**5. Transgender Rights**

- *Litigate* for significant damages award in Library of Congress employment discrimination case (and persuade DOJ not to appeal this landmark case); 3 job discrimination cases (win 1+); to challenge 3 states' denial of trans-specific health care (win 1+); or advocate against 2 states' refusal to change birth certificates (win in 1)
- *Advocate* for GI nondiscrimination "catch-up" bills in 7 states (succeed in 2); to protect trans students in 5 states (succeed in 3); for good policies on federal ID changes (e.g., passports)
- *Educate* public by developing story bank on harms resulting from inability to change ID; outreach initiative on legal needs trans youth; and best strategy to counter "bathroom arguments" against nondiscrimination laws

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# ACLU LGBT & AIDS Project

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Key Accomplishments in FY2009

*Due to space limitations, list below doesn't include cases/campaigns lost, many of which involved substantial resources and moved public attitudes forward.*

#### 1. Relationship Recognition

- In *litigation* coalitions: won marriage and highest-level constitutional protections for gay people in CA Supreme Ct.; won dispute over Prop 8 title and summary; won marriage in CT; filed brief in IA Supreme Ct. (pending); won NY recognition of out-of-state marriages; sought DP protections for state employees in NM and WI (pending)
- In *advocacy* coalitions: won marriage in ME; worked for marriage in MD, NH, NJ, NY, VT (all pending) and stopped anti-marriage bills in DE, IA, ME, PA, PR, and WY; repealed MA law used to bar marriages of non-resident same-sex couples; worked for CUs or comprehensive DPs in HI, IL, NM, NV, WA (WA successful; others pending); defeated AR ban on local DPs; got H & R Block to treat CU and married couples equally; got GA program helping uninsured to stop discriminating against same-sex couples
- Revamped marriage activist toolkit, including adding advice on when not to sue. Launched *Tell 3* ([www.tell-three.org](http://www.tell-three.org)) public education campaign to encourage LGBT people and allies to talk to family and friends about what it means to be LGBT

#### 2. Youth and Schools

- In *litigation* coalitions: won federal cases to form GSA (judge made unprecedented ruling that schools must provide for gay students' well-being) and to strike down ban against expressing support for LGBT classmates in 2 FL high school districts; protected GSAs at high schools in AZ, MN, NC, NE, OK, PA, SC, TX; won anti-gay student harassment cases in CA, KY, PA; got school districts in AL, AR, CA, IL, OK and TX to open proms to same-sex couples; defended student's privacy rights against "outing" by principal in SD; won federal appeals case in MA against parents asserting religious right to "opt out" of gay-positive instruction; resolved Day of Silence disputes in ID and TX; got schools in CA, PA, VA to allow pro-LGBT t-shirts. Created new student activist online materials.
- In *advocacy* coalitions: won laws or policies promoting safety for LGBT youth in CA, FL, NE, NY (juvenile detention facilities), and Nashville (IL, MA, MI, MN, MO, NC, NY efforts pending); fought MA bill requiring parental consent for any classroom discussion of SO (pending); defeated TN bill to ban discussion about homosexuality in public schools

#### 3. Parenting

- In *litigation* coalitions: won (5th ACLU) challenge to FL ban on adoption by gay people (court found that science proves kids not harmed by being raised by gay parents and that this ban harms at-risk kids; on appeal); sued AR over new law banning adoption and foster parenting by unmarried couples (pending); appealed TN family court rule prohibiting partner of divorced parent from spending night with kids present (pending); overturned court decision using MI anti-gay marriage amendment to justify nonrecognition of out-of-state lesbian couples' adoption; briefed WV high court against separation of infant from lesbian foster parents and prevention of adoption (pending); won joint adoption rights in ME; defended out-of-state 2nd-parent adoption in NC (pending); won rights for non-bio LGBT parents in MT (on appeal; similar cases in MO and NY (pending); helped lesbian couple in TX adopt 5 siblings they had foster-parented
- In *advocacy* coalitions: defeated KY and TN bills to ban adoption by gay couples; worked for 2nd-parent adoption laws in MI and NV (pending)

#### 4. Basic Civil Rights

- In *litigation* coalitions: won CA high court ruling that doctor's religious beliefs don't justify refusal to serve lesbian patient; prevented CA religious student groups from gaining college recognition despite noncompliance with nondiscrimination policies; sued KY state-funded Baptist agency for firing lesbian counselor (appeal pending); challenged discriminatory practices by city-funded religious homeless services group in MI (pending); appealed case in PA arguing that firing of effeminate gay man is illegal sex and religious discrimination; favorably settled case of gay men targeted for homophobic slurs by workers at Louisville McDonald's; sued for IL Costco worker targeted for race, sex and SO harassment (pending); won 9th Circuit rulings that gay servicemembers can't be discharged without evidence they harm unit cohesion and that roommate-finding website can't require customers to disclose SO; won asylum for gay Pakistani on appeal
- In *advocacy* coalitions: won nondiscrimination laws in CO, Hamtramck (MI) (efforts in Anchorage (AL), DE, FL, IL, KS, KY, MO, MT, NV, OH, PA, WV and for ENDA pending); stopped ME and Gainesville (FL) initiatives to repeal LGBT protections; tabled NY Religious Freedom Restoration Act over threat to LGBT nondiscrimination protections; won hate crimes enforcement in TN

#### 5. Transgender Rights

- In *litigation* coalitions: won federal ruling against Library of Congress for denying job to transitioning Special Forces veteran (groundbreaking ruling of sex discrimination under federal law); challenged discrimination in employment in DC (security clearance) and MO and TN (truck drivers, pending) in housing in AZ homeless shelter, in public accommodations in NY, and in healthcare in ID, OR, and WI prisons (won in AZ and NY; others pending); challenged IL refusal to change gender markers on birth certificates of people who had sex reassignment surgery abroad (pending); got perjury charges dropped against MO trans woman whose home state refused to change birth certificate gender marker; got trans students in AK and NY permission to use GI-appropriate bathrooms; persuaded private school in IL to allow trans girl to follow girls' dress code and school in IN to allow lesbian senior to wear tux to prom

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

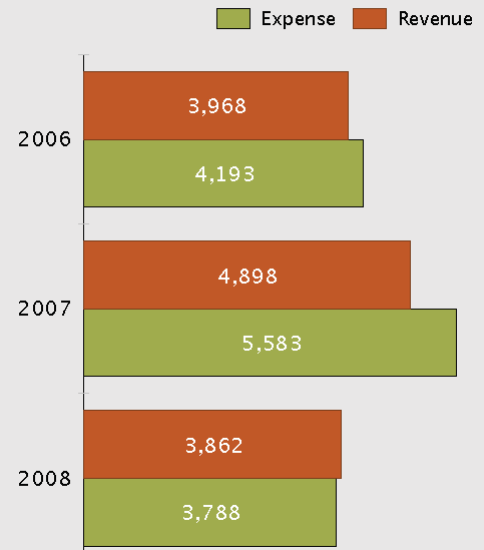
- In *advocacy* coalitions: catalyzed 1st-ever Congressional hearings on anti-trans discrimination; won GI nondiscrimination laws or good implementing regs in DC, Detroit, Kansas City, and Cleveland (pending in CT and NH); won nondiscrimination policies for Chicago homeless shelters; won MI Medicaid coverage of GID; eased MI requirements to change birth certificate gender markers; persuaded WA interscholastic athletic association to adopt 1st good rules in US on trans student athletes
- Published and distributed *Know Your Rights: Transgender People and the Law*

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

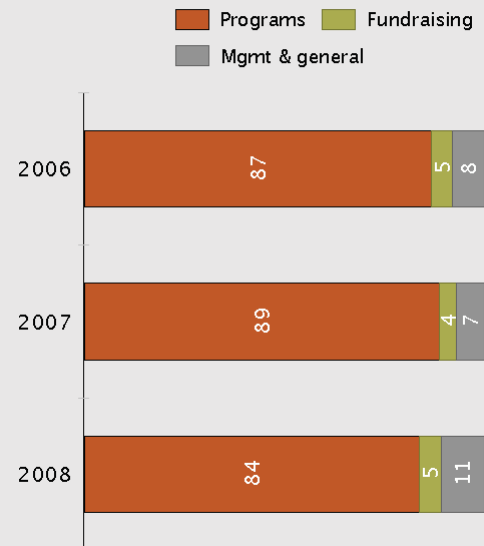
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending March 31		
	2006	2007	2008
Liquidity ratio	N/A	N/A	N/A
Days of working capital	N/A	N/A	N/A
Working capital (\$000)	N/A	N/A	N/A
Average daily cash expense (\$000)	\$6.9	\$7.4	\$8.5
Fundraising expense (cash only) to raise \$1	\$0.10	\$0.13	\$0.09
Total revenue raised through development efforts (\$000)	\$2,111	\$1,804	\$2,407
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	606	531	421
Number of individual donors who gave > \$1,000	165	154	156
Donor turnover (gave > \$35 in prior FY & not this FY)	46%	52%	48%
Number of individuals attending fundraising events (paid > \$100 per person)	0	0	0
Percent of total revenue from top 10 contributors	35%	24%	40%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 4,609	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>N/A</u> <u>2006</u>	<u>N/A</u> <u>2007</u>	<u>N/A</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	N/A	N/A	N/A
Net cash provided (used) by operating activities	N/A	N/A	N/A
Net cash provided (used) by investing activities	N/A	N/A	N/A
Net cash provided (used) by financing activities	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>
Net increase (decrease) in cash	N/A	N/A	N/A
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>

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**Statement of Financial Position**

	N/A 2006	N/A 2007	N/A 2008
<i>Assets</i>			
Cash and cash equivalents	N/A	N/A	N/A
Investments	N/A	N/A	N/A
Other current assets	N/A	N/A	N/A
Net fixed assets	N/A	N/A	N/A
Other long-term assets	N/A	N/A	N/A
<b>Total Assets</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<i>Liabilities</i>			
Current liabilities	N/A	N/A	N/A
Long-term debt	N/A	N/A	N/A
Other long-term liabilities	N/A	N/A	N/A
<b>Total Liabilities</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<i>Net Assets</i>			
Unrestricted	N/A	N/A	N/A
Temporarily restricted	N/A	N/A	N/A
Permanently restricted	N/A	N/A	N/A
<b>Total Liabilities and Net Assets</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

**Statement of Activities**

	Derivative 2006		Derivative 2007		Derivative 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$1,148,100	29%	\$919,453	19%	\$944,442	24%
Bequests	108,188	3%	108,017	2%	658,178	17%
Dues	0	0%	0	0%	0	0%
In-kind contributions	1,675,651	42%	2,895,299	59%	696,099	18%
Foundation contributions	765,000	19%	666,159	14%	666,348	17%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	117,500	3%	147,150	3%	143,800	4%
Less costs of direct benefit to donors	-27,817	-1%	-36,948	-1%	-6,210	-0%
Net fundraising event income	\$89,683		\$110,202		\$137,590	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	175,771	4%	188,350	4%	159,485	4%
Other revenue	5,892	0%	10,913	0%	600,000	16%
<b>Total Revenue</b>	<b>\$3,968,285</b>		<b>\$4,898,393</b>		<b>\$3,862,142</b>	
<i>Expenses</i>						
Program services	1,960,652	47%	2,050,712	37%	2,469,852	65%
Fundraising	214,823	5%	233,629	4%	206,648	5%
Management and general	341,783	8%	403,117	7%	415,273	11%
Total cash expenses	\$2,517,258		\$2,687,458		\$3,091,773	
Non-cash expenses						
In-kind	1,675,651	40%	2,895,299	52%	696,099	18%
Depreciation	0	0%	0	0%	0	0%
Total non-cash expenses	\$1,675,651		\$2,895,299		\$696,099	
<b>Total Expenses</b>	<b>\$4,192,909</b>		<b>\$5,582,757</b>		<b>\$3,787,872</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$224,624</b>		<b>-\$684,364</b>		<b>\$74,270</b>	

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**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
12	67%	33%	0%	None	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
8%	8%	76%	8%	0%	0%

**Locations & Contact**

ACLU LGBT & AIDS Project  
125 Broad St., 18th Floor  
New York, NY 10004  
212-549-2627  
www.aclu.org/getequal/aboutus.html

Additional Locations

Washington DC  
Chicago  
San Francisco  
Nashville

Legal Names

Lesbian Gay Bisexual  
Transgender & AIDS Project  
of the American Civil  
Liberties Union Foundation -  
501(c)(3)

Contact

Matt Coles  
Project Director  
mcoles@aclu.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	3.0	10.5	22.0
Compensation	N/A	\$115,715	N/A

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
19	16	3	42%	58%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	21%	79%	0%	0%	0%

*Note: Board and staff data as of 3/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Statement of Financial Position** - While the Project operates as a part of the ACLU Foundation, the Foundation does not prepare a separate balance sheet for the Project and therefore Statements of Financial Position are not presented in this report. However, the Project does have 3 significant assets: 1) its reserve fund, the "Rainbow Fund," (see note 4); 2) its litigation fund (made up of attorneys' fees collected, see note 4); and 3) endowment funds in the ACLU's Bill of Rights Trust. Earnings on the endowment fund are included as income to the Project. The balances in those funds at the close of FY2008 were: 1) Rainbow Fund, \$2,435,485; 2) Litigation Fund, \$735,851; and 3) Bill of Rights Trust, \$ 1,246,866.
- Statement of Activities** - The Statements of Activities shown above use the numbers that were used to compile the ACLU Foundation's audited financial statements. However, the ACLU Foundation did not create audited statements specifically for the Project. Accordingly, the Project's financial statements in this report are listed as "Derivative," but are based on audited figures at the Foundation level.
- Fiscal Year** - The ACLU Foundation's fiscal year is April 1 to March 31.
- Bequests and Attorneys Fees** - Since the Project does not have a reliably predictable stream of either bequests or attorneys' fees (reported on the Statement of Activities as Other Revenue), the Project does not include them in income for its own budgeting purposes. The Project places bequests and any operating funds left after expenses into its reserve fund, along with the reserve's own earnings. Attorneys' fees are placed in the ACLU Foundation's litigation fund, which maintains an account for the Project. Thus, for the Project's budgeting purposes, its cash income (not including in-kind donations) in FY2006 was \$2,060,271, in FY2007 was \$1,764,842, and in FY2008 was \$2,392,556. Thus, under the internal system, which treats fees and bequests as extraordinary events, the Project had a deficit covered by reserves of \$484,804 in FY2006, a deficit covered by reserves of \$959,564 in FY2007, and a deficit covered by reserves of \$705,427 in FY2008. The ACLU believes that treating bequests and fees this way allows for more predictable long-term budgeting. The Project's reserve fund has historically been used to pay to launch new initiatives before regular funding was secured. Starting in 2004, the Project significantly expanded its capacity in order to do more marriage work and created a Field and Legislative program as well. The reserve fund is now being used to underwrite this work.

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5. **In-Kind Contributions and Expenses** - These are donated services by attorneys to further the Project's programmatic goals. The Project began to track these in-kind contributions and expenses in FY2006. The Project does not include these contributions and expenses in its budget.
6. **General Fund Transfer** - In FY2008, the ACLU Foundation's general fund transferred \$600,000 (reported on the Statement of Activities as Other Revenue) to the Project to help cover the costs of a substantial increase in the Project's marriage work and its legislative and field work.
7. **Board Member Information** - Board information provided is for the board of the ACLU Foundation. The Project does not have a separate board.
8. **Senior Management Compensation** - The average compensation reported above is based on full-time equivalent salaries. Per ACLU Foundation policy, employee compensation information cannot be reported. However, in addition to the average compensation, senior managers at the Project have a median compensation of \$93,835 and disparity in compensation among the group of \$89,185
9. **Individual Donors** - A small percentage of these donors made gifts to state ACLU affiliate events. The Project is not able to track the number of donors who made such gifts.

**2009 Affirmations Lesbian and Gay Community Center**  
**Standard Annual Report**

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**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1989	Michigan
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Cnty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,466,328	18
<i>Tax Status*</i>	
501(c)(3)	99%
501(c)(4)	1%

\* Percent of latest FY revenue.

**Mission**

Provide a welcoming space where people of all sexual orientations, gender identities and expressions, and cultures can find support and unconditional acceptance, and where they can learn, grow, socialize and have fun.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

**1. Managed Growth**

- Intensify growth of programs and services within the tri-county region, with focus on underserved geographic areas and communities of color. This will be measurable by seeing an increase in usage, volunteers, and leadership among targeted communities.
- Embrace diversity - this will be measurable by a sense of the change in culture and environment at Affirmations; it will be a subjective measurement.
- We will increase the number of collaborative partnerships with other LGBT and non-LGBT organizations in order to provide more comprehensive programming to our users. We will track collaborative programs and participation in joint programs.

**2. Fiscal Health**

- Develop annual fundraising planning process.
- Create a functioning and effective donor management system. We currently use Donor Perfect for our data management and Convio for our online giving. The two programs do not always play nice together, thus leaving gaps in our donor management and jeopardizing donor relations.
- Ensure that resources are available for both infrastructure and programmatic priorities.

**3. Operational Excellence**

- Ensure internal communications exist and are functioning effectively so that departments work well together and are efficient and effective.
- Ensure that staffing resources meet the needs of the organization in order to continue the quality of services and programs the community expects and deserves. It will also support the staff in their well-being by minimizing work stress and burnout.
- Develop a well-managed organizational growth strategy that looks at the big picture by balancing the program demands of the community with available resources – both financial and human.

One-year Key Planned Accomplishments for FY2009

- 1. Managed Growth** - Develop/expand collaborative partnerships in order to develop/expand programming, infrastructure, etc.
- 2. Fiscal Health**
  - Create a functioning and effective donor management system.
  - Ensure that resources are available for both infrastructure and programmatic priorities.
- 3. Operational Excellence** - Ensure that human resources meet the needs of the organization.

**2009**

**Affirmations Lesbian and Gay Community Center**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2008

**1. Managed Growth**

- Transitioned board into a Governance Board from an Operating Board where the board now focuses on setting policy, ensuring sufficient resources are available for resourcing the policies they set, and identifying potential board members who can do a better job at the first two items when they exit the board.
- Achieved Moderate increase in number of users which corresponded to the economic challenges the Center was facing.
- Made decision to NOT begin programming offsite in order to keep Center-focused programs healthy due to economic challenges.

**2. Fiscal Health** - Identified new sources of corporate revenue outside of the automotive industry and had largest AIDS Walk team for 2nd year in a row.

**3. Operational Excellence**

- Experienced record attendance in our youth program.
- Held our first Homocoming Dance for youth and Pride Dance for adults.
- Held first 2-day staff retreat and focused on team building and breaking down barriers.
- Created a Multicultural Advisory Committee that meets semi-monthly to address diversity and inclusivity issues within Affirmations and the greater Detroit LGBT community.

# 2009 Affirmations Lesbian and Gay Community Center

## Standard Annual Report

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

### Indicators of Financial Health & Efficiency

For the fiscal year ending December 31

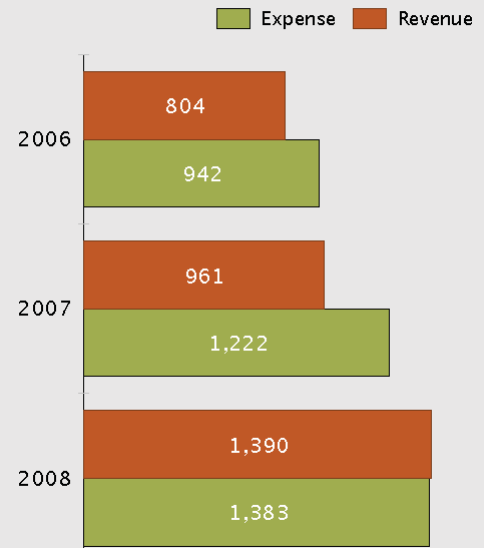
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	1.3	0.8	0.5
Days of working capital	349	188	98
Working capital (\$000)	\$879	\$571	\$327
Average daily cash expense (\$000)	\$2.5	\$3.0	\$3.3
Fundraising expense (cash only) to raise \$1	\$0.09	\$0.21	\$0.17
Total revenue raised through development efforts (\$000)	\$768	\$904	\$1,349

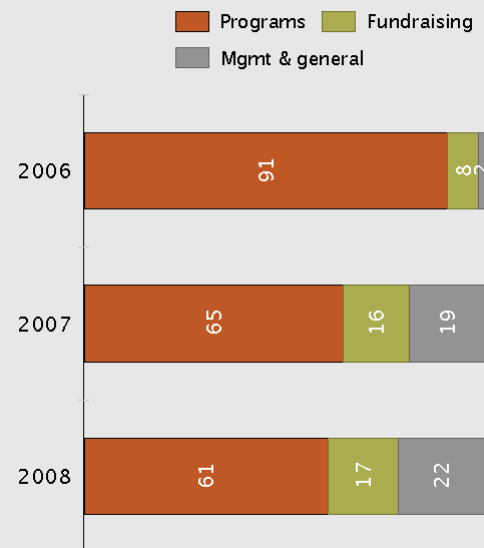
Indicators of Contributor Base

Number of individual donors who gave > \$35	855	812	923
Number of individual donors who gave > \$1,000	29	17	122
Donor turnover (gave > \$35 in prior FY & not this FY)	48%	42%	63%
Number of individuals attending fundraising events (paid > \$100 per person)	468	421	376
Percent of total revenue from top 10 contributors	41%	40%	36%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 12,807	

### Revenue -vs- Expense (\$000)



### Expense Percentage



### Statement of Cash Flows

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$918,717	\$326,319	\$432,850
Net cash provided (used) by operating activities	872,827	278,394	347,902
Net cash provided (used) by investing activities	-1,787,619	-1,182,356	-86,077
Net cash provided (used) by financing activities	322,394	1,010,493	-359,518
Net increase (decrease) in cash	-\$592,398	\$106,531	-\$97,693
<b>Cash and Cash Equivalent Balances at End of Year</b>	<b>\$326,319</b>	<b>\$432,850</b>	<b>\$335,157</b>

**2009 Affirmations Lesbian and Gay Community Center**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$326,319		\$432,850		\$335,157
Investments	0		0		0
Other current assets	804,292		659,727		602,885
Net fixed assets	2,423,973		3,562,475		3,471,397
Other long-term assets	743,065		359,244		251,001
<b>Total Assets</b>	<b>\$4,297,649</b>		<b>\$5,014,296</b>		<b>\$4,660,440</b>
<b>Liabilities</b>					
Current liabilities	\$251,422		\$521,542		\$611,272
Long-term debt	209,633		909,985		565,040
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$461,055</b>		<b>\$1,431,527</b>		<b>\$1,176,312</b>
<b>Net Assets</b>					
Unrestricted	2,288,039		3,300,369		3,118,021
Temporarily restricted	1,432,315		161,734		366,107
Permanently restricted	116,240		120,666		0
<b>Total Liabilities and Net Assets</b>	<b>\$4,297,649</b>		<b>\$5,014,296</b>		<b>\$4,660,440</b>

**Statement of Activities**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$76,134	9%	\$72,237	8%	\$164,007	12%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	24,530	3%	18,794	2%	17,179	1%
Foundation contributions	209,417	26%	75,109	8%	684,571	49%
Corporate contributions/Non-event sponsorships	22,075	3%	277,525	29%	75,000	5%
Government funding	32,250	4%	0	0%	59,767	4%
Program income	21,301	3%	31,180	3%	22,001	2%
Fundraising event income	477,047	59%	526,192	55%	468,066	34%
Less costs of direct benefit to donors	-73,390	-9%	-65,868	-7%	-107,351	-8%
Net fundraising event income	\$403,657		\$460,324		\$360,715	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	5,722	1%	2,180	0%	-7,890	-1%
Other revenue	9,232	1%	23,180	2%	14,455	1%
<b>Total Revenue</b>	<b>\$804,318</b>		<b>\$960,529</b>		<b>\$1,389,805</b>	
<b>Expenses</b>						
Program services	832,852	88%	683,922	56%	703,508	51%
Fundraising	70,710	8%	192,375	16%	232,553	17%
Management and general	16,092	2%	230,135	19%	284,376	21%
Total cash expenses	\$919,654		\$1,106,432		\$1,220,437	
Non-cash expenses						
In-kind	11,180	1%	13,544	1%	14,621	1%
Depreciation	11,546	1%	102,505	8%	148,083	11%
Total non-cash expenses	\$22,726		\$116,049		\$162,704	
<b>Total Expenses</b>	<b>\$942,380</b>		<b>\$1,222,481</b>		<b>\$1,383,141</b>	
Capital campaign net revenue	534,857		8,127		-105,305	
<b>Change in Net Assets</b>	<b>\$396,795</b>		<b>-\$253,825</b>		<b>-\$98,641</b>	

# 2009 Affirmations Lesbian and Gay Community Center Standard Annual Report

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

## Board Members

Total	Male	Female	Transgender	Fundraising Requirements	
16	62%	38%	0%	Must be a member, a Center Partner, and support major fundraising events	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
6%	0%	88%	0%	0%	6%

## Locations & Contact

Affirmations Lesbian and Gay Community Center  
290 W. Nine Mile Road  
Ferndale, MI 48220  
248-398-7105  
www.goaffirmations.org

### Additional Locations

None

### Legal Names

Affirmations Lesbian and Gay Community Center - 501(c)(3)  
Affirmations Action Fund (AAF) - 501(c)(4)

## Senior Management Profile

	Lowest	Average	Highest
Tenure with the organization	2.5	5.4	9.8
Compensation	\$44,000	\$68,574	\$102,191

## Paid Staff

Total	Full-Time	Part-Time	Male	Female	Transgender
18	10	8	39%	61%	11%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
22%	0%	61%	6%	0%	11%

### Contact

Leslie Ann Thompson  
Chief Executive Officer  
lthompson@goaffirmations.org

Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

## Organization's Notes and Advisories

- And it started out so good...** Affirmations jumped into 2008 with a new organizational chart, plans to shift to a Governance Board and enjoying having just completed a year with record attendance. Our new org chart turned out to be very effective and the board transition was very smooth. And we had another year of record attendance even if on a smaller growth scale. Mid-summer nearly all our staff, part-time and full-time attended a two day retreat up at a lodge in northern Michigan, creating more cohesiveness than we have ever experienced before. But then the economy and its impact on the auto industry hit our organization very hard in the 3<sup>rd</sup> and 4<sup>th</sup> quarter. As we closed out the year we made difficult decisions not to replace open positions and layoff staff so we could end the year as strongly as possible. Staff morale dropped and it made for a challenging year-end.
- Goals and Objectives** - We continued to work on our 2008-2010 Strategic Plan but made some major adjustments in our goals around reaching out to provide programming offsite. Our staff utilized our limited resources to continue providing quality programs that would meet the needs of the community.
- Board Governance** - It was a huge paradigm shift for many board members and there was an adjustment period for a couple months, but the process was working very well by the end of the year. The time demand lessened for board members who were better able to focus the time they did commit to the organization. More board ownership in roles and responsibilities was evident. A stronger organizational process was created, which opened up communication between board committees and created a smoother process in board action items.
- Affirmations Action Fund** - Affirmations made the decision in the fall of 2008 to create a 501(c)(4) so that we could utilize resources to help affect change in the progress toward equality for lesbian, gay, bisexual, and transgender individuals and families.



**2009**

**Audre Lorde Project, Inc.**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1996	New York City
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$567,008	6
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Work for community wellness and progressive social and economic justice on behalf of Lesbian, Gay, Bisexual, Two Spirit, Trans and Gender Non Conforming People of Color (LGBTSTGNC POC) in the NYC area through community organizing, education and capacity-building. Committed to struggle across differences, the Audre Lorde Project (ALP) seeks to responsibly reflect, represent and serve our various communities.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Advance local grassroots organizing campaigns to change policy or practice on issues including safety local LGBTSTGNC POC and discrimination towards Trans and Gender Non Conforming (TGNC) communities seeking public assistance/welfare. Strengthen ALP's communications and infrastructure to raise local and national visibility of LGBTSTGNC POC issues and to share ALP's innovative and unique program models.
2. Increase and broaden engagement of LGBTSTGNC POC communities in NYC through increased access to culturally competent information, resources, training and support for LGBTSTGNC POC and their organizations. Strengthen NYC network of 40+ LGBTSTGNC POC organizations.
3. Support LGBTSGNC POC leadership, particularly in communities with least resources and support, through culturally competent leadership development, political education, and engagement of leaders and organizers on critical community issues.
4. Build alliances and collaborate with LGBT and non-LGBT organizations and communities across movements (particularly in immigration) in order to increase both LGBTSTGNC POC consciousness of issues and integration of LGBTSTGNC POC needs within the movements' scope and strategies.

One-year Key Planned Accomplishments for FY2010

1. Conduct local grassroots organizing campaigns to increase safety for LGBTSTGNC POC in Bed Stuy, Brooklyn through an innovative community accountability organizing model. Facilitate campaign led by TGNC POC to decrease ongoing discrimination in public assistance/welfare in NYC.
2. Reach LGBTSTGNC POC and their organizations in NYC via coordination and support of a network of 40+ LGBTSTGNC POC organizations, an annual leadership retreat for LGBTSTGNC POC, ALP's innovative Translator Training Project, and ALP's LGBTSTGNC POC Community Organizing Training.
3. Conduct culturally-competent community outreach, public forums, mobilizations, gatherings, cultural and wellness activities that reach 1,000+ LGBTSTGNC POC in NYC.
4. Participate in local, national and international gatherings and forums across movements – particularly in immigrant rights – to integrate needs and analysis of LGBTSTGNC POC in those movements.
5. Develop multi-year communications plan and strengthen existing communications infrastructure (e.g., website, listserv).

**2009**

**Audre Lorde Project, Inc.**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

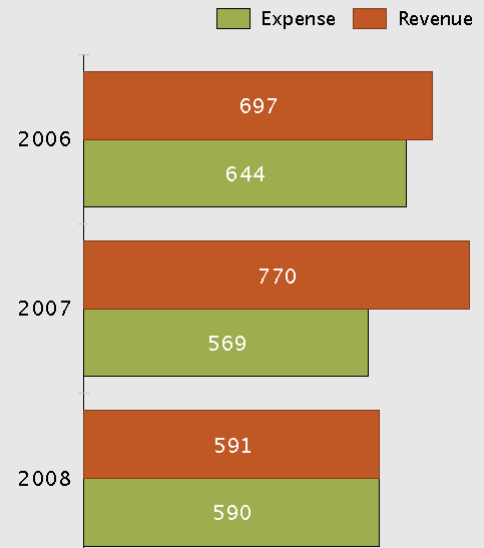
1. Organized 2nd Annual Safe Neighborhood Summit in Bed Stuy, reaching 180 individuals; engaged in community response to incidents of violence locally; won a campaign to drop false charges against a community member brutalized by Bed Stuy police; and pressured/worked with NYC Human Resources Administration to complete final draft of Procedure for TGNC Client/Participant Services.
2. Coordinated NYC network of 40 LGBTSTGNC POC organizations; held annual leadership retreat for NYC-based LGBTSTGNC POC; continued Translator Training Project for LGBTSTGNC immigrants of color, graduating 17 translators; continued only Multi-Generational Community Organizing Training for LGBTSTGNC POC in NYC, graduating 26; organized Skills-Building Series for LGBTSTGNC youth of color, reaching 50+; and held leadership development trainings for ALP board, staff and volunteers.
3. Held annual community BBQ, reaching 275 community members; annual Trans March during Pride, reaching 500+; retreat on fighting burn-out among LGBTSTGNC POC leaders; open community forums and dialogues (e.g., forum on Caribbean Sexuality reaching 50 people); and ongoing open community meetings for immigrants, TGNC communities, and individuals impacted by violence.
4. Established permanent LGBT component within National Network for Immigrant and Refugee Rights; participated in local and national gatherings raising the visibility of LGBTSTGNC POC issues; published statement on current conditions and the 2008 presidential election; and co-facilitated Racial Justice Institutes at NGLTF's Creating Change conference.
5. Completed multi-stakeholder strategic plan and strengthened existing communication infrastructure (e.g., ALP's website with 28,750+ unique visitors annually). Launched revamped mini resource guide promoting NYC LGBTSTGNC POC organizations and 2 organization social networking pages.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

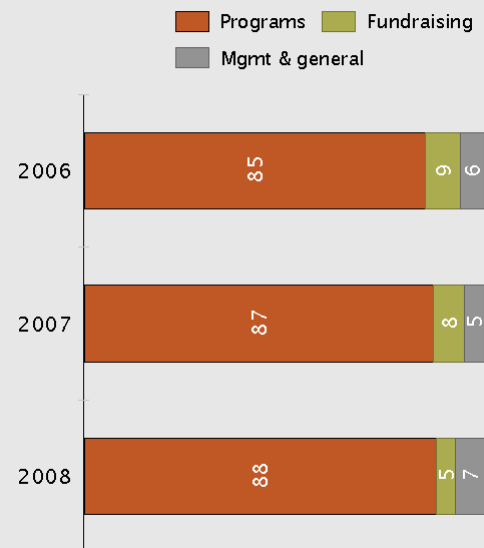
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	1.7	1.5	2.9
Days of working capital	153	248	261
Working capital (\$000)	\$268	\$384	\$420
Average daily cash expense (\$000)	\$1.7	\$1.6	\$1.6
Fundraising expense (cash only) to raise \$1	\$0.08	\$0.06	\$0.05
Total revenue raised through development efforts (\$000)	\$696	\$768	\$589
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	80	94	98
Number of individual donors who gave > \$1,000	11	6	9
Donor turnover (gave > \$35 in prior FY & not this FY)	36%	31%	12%
Number of individuals attending fundraising events (paid > \$100 per person)	0	0	0
Percent of total revenue from top 10 contributors	31%	24%	31%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 4,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$105,775	\$122,851	\$109,501
Net cash provided (used) by operating activities	17,076	-13,350	126,768
Net cash provided (used) by investing activities	0	0	-3,725
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$17,076	-\$13,350	\$123,043
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$122,851</u>	<u>\$109,501</u>	<u>\$232,544</u>

2009

## Audre Lorde Project, Inc.

### Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<b>Assets</b>					
Cash and cash equivalents	\$122,851		\$109,501		\$232,544
Investments	0		0		0
Other current assets	217,104		349,086		266,674
Net fixed assets	2,597		310		3,104
Other long-term assets	0		86,770		49,383
<b>Total Assets</b>	<b>\$342,552</b>		<b>\$545,667</b>		<b>\$551,705</b>
<b>Liabilities</b>					
Current liabilities	\$72,133		\$74,238		\$79,176
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$72,133</b>		<b>\$74,238</b>		<b>\$79,176</b>
<b>Net Assets</b>					
Unrestricted	142,594		147,995		166,469
Temporarily restricted	127,825		323,434		306,060
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$342,552</b>		<b>\$545,667</b>		<b>\$551,705</b>

### Statement of Activities

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$34,551	5%	\$34,998	5%	\$40,235	7%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	1,001	0%
Foundation contributions	230,560	33%	348,720	45%	130,312	22%
Corporate contributions/Non-event sponsorships	2,445	0%	1,001	0%	3,677	1%
Government funding	404,353	58%	366,726	48%	395,994	67%
Program income	7,761	1%	3,195	0%	6,065	1%
Fundraising event income	20,207	3%	23,069	3%	15,281	3%
Less costs of direct benefit to donors	-4,000	-1%	-10,000	-1%	-3,479	-1%
Net fundraising event income	\$16,207		\$13,069		\$11,802	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	888	0%	2,387	0%	2,104	0%
<b>Total Revenue</b>	<b>\$696,765</b>		<b>\$770,096</b>		<b>\$591,190</b>	
<b>Expenses</b>						
Program services	548,991	85%	495,388	87%	517,830	88%
Fundraising	55,740	9%	44,788	8%	28,271	5%
Management and general	33,777	5%	26,623	5%	42,057	7%
Total cash expenses	\$638,508		\$566,799		\$588,158	
Non-cash expenses						
In-kind	0	0%	0	0%	1,001	0%
Depreciation	5,636	1%	2,287	0%	931	0%
Total non-cash expenses	\$5,636		\$2,287		\$1,932	
<b>Total Expenses</b>	<b>\$644,144</b>		<b>\$569,086</b>		<b>\$590,090</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$52,621</b>		<b>\$201,010</b>		<b>\$1,100</b>	

**2009**

**Audre Lorde Project, Inc.  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
6	0%	100%	33%	Each board member must set a give/get goal annually that is a "stretch" for them.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
33%	50%	0%	17%	0%	0%

**Locations & Contact**

Audre Lorde Project, Inc.  
85 S. Oxford St.  
Brooklyn, NY 11217-1607  
718-596-0342  
www.alp.org

Additional Locations

None

Legal Names

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	4.0	6.5	8.0
Compensation	\$43,240	\$43,240	\$43,240

Audre Lorde Project, Inc. - 501(c)(3)

Contact

Kris Hayashi  
Executive Director  
khayashi@alp.org

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
6	3	3	33%	67%	33%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
67%	33%	0%	0%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Financial Operations** - ALP is building its infrastructure by increasing its assets and decreasing its expenses. In reviewing the Statement of Financial Position, total assets have grown from \$342,552 in FY2006 to \$551,705 in FY2008, an increase of \$209,153 or 61% over 2 years. Expenses have decreased from \$644,144 in FY2006 to \$590,090 in FY2008, a decrease of \$54,054 in two years or 8%.
- Liquidity Ratio & Working Capital** - Grounded in the organization's commitment to build infrastructure and stability, our working capital has grown from \$268,000 in FY2006 to \$420,000 in FY2008, an increase of \$152,000 or 57% in 2 years. ALP has been building its cash reserves as evidenced by the increase in the liquidity ratio from 1.7 times cash to cover current liabilities in FY2006 to 2.9 times cash in FY2008.

For additional information, please contact the Audre Lorde Project or visit our website at www.alp.org.



**2009**

**Bienestar Human Services**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1989	Southern CA, CA & National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$4,000,000	81
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

BIENESTAR is committed to enhancing the health and well-being of the Latino community and other underserved communities. Bienestar accomplishes this through community education, prevention, mobilization, advocacy, and the provision of direct social support services.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Develop and/or enhance efforts to ensure a strong national voice addressing the LGBT and HIV/AIDS needs of Latinos at a national level. BIENESTAR plans to accomplish this goal by continuing its yearly Congressional Briefing, scheduling of at least 5 yearly meetings with elected officials, and raising funds to open an office in Washington DC to promote these efforts year round.
2. Diversification of services and programs through the provision of substance abuse, primary care clinic, and LGBT mental health support services. As client needs become more complex, BIENESTAR needs to evolve to meet these new needs. Recent years have seen increased use of methamphetamines in Latino gay men, especially youth. Currently, there are no treatments that addresses the special needs for Latino gay men. BIENESTAR is currently working with the National Institute of Health (NIH), Substance Abuse & Mental Health Services Administration (SAMHSA) to develop a treatment clinic that addresses these issues. Planning stages began in early June 2009 and the initial assessment has been completed. BIENESTAR has set in motion a fundraising plan for this endeavor and foresees to have allocated enough funds by March 2010. After funding is secure, search for qualified staff, as well as submission for all required licenses will begin. The licensing process in CA takes approximately 9 to 12 months. This phase should be completed by June 2011. Substance abuse services will begin by September 2011. Incorporation for mental health services will begin September 2011. Mental health services will not be fully incorporated until January 2012. Planning to become a primary care clinic will begin March 2012. Environmental assessment will be completed by July 2012. Funding strategy to begin July 2012 and concluded by June 2013. Implementation of services to start September 2013.
3. Creation of additional non-government revenue streams that will support the agency's programs and services. Currently BIENESTAR is 90% funded through government grants. BIENESTAR plans to diversify its funding sources to 75% government, 15% foundations and 10% individual donors. By June 2011, BIENESTAR plans to have 88% government, 8% foundations, 4% individual donors. By June 2012, BIENESTAR plans to have 85% government, 9% foundations, 6% individual donors. By June 2013, BIENESTAR plans to have 80% government, 12% foundations, 8% individual donors. By June 2014, BIENESTAR plans to have 75% government, 15% foundations, 10% individual donors.

One-year Key Planned Accomplishments for FY2010

1. Continue to enhance the agency's role in regard to policy, advocacy, and community mobilization. BIENESTAR plans to submit an LGBT bill of rights to the California Legislature. This effort will be led by a member of BIENESTAR'S Proyecto Orgullo (Project Pride) which focuses on educating and mobilizing our community on issues affecting LGBT Latina/o's rights and protections. The mobilization portion of this effort will be led by BIENESTAR's Agentes de Cambio (Agents of Change) program members. Agentes de Cambio seeks to eliminate HIV/AIDS stigma in the Latino community.

**2009**

**Bienestar Human Services**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

2. Enhance our current programs and services through our 11 community sites and capacity-building consultation services. BIENESTAR will be providing-capacity building assistance to at least 5 HIV/AIDS organization in the greater Las Vegas area and Northern CA.
3. Continue to diversify our funding base and strengthen the infrastructure of the organization. By June 2011, BIENESTAR plans to have 88% government, 8% foundations, 4% individual donor funding.

Key Accomplishments in FY2009

1. BIENESTAR conducted its 4th Annual Congressional Briefing on Latinos and HIV/AIDS. Speakers included Congresswoman Lucille Royball-Allard and Jeff Crowley, White House National Strategic AIDS Coordinator, among others. The topics for discussion included an update on the efforts to lift the HIV ban, opportunities for advancing HIV prevention among Latino gay men and the refocusing of the Minority AIDS Initiative under the Obama administration.
2. BIENESTAR staff, as part of the People of Color Committee, met twice with Jeff Crowley, White House National Strategic AIDS Coordinator, in the White House to provide an update on the state of the HIV/AIDS epidemic in the Latino community and provide feedback on the Ryan White CARE Act and the Minority AIDS Initiative.
3. BIENESTAR staff met in Washington DC with key staff from NIH, Office of AIDS Research to discuss drug use among Latino gay men. This meeting served as initial discussion to develop a strategy for funding an outpatient drug treatment center.
4. BIENESTAR conducted its 4th Annual Legislative Briefing on Latinos and HIV/AIDS in Sacramento. Speakers included Assemblyman John Perez and Dr. Steven Shoptaw, among others. The topics for discussion included the impact of budget cuts on HIV/AIDS services to Latinos, the role of substance abuse in new cases of HIV in Latinos and treatment adherence issues among Latinos.
5. Due to the CA budget crisis, BIENESTAR has had to revisit its sustainability plan to reduce the impact of these cuts on the community. BIENESTAR has been meeting with elected and public officials, community leaders, and stakeholders to garner support for HIV/AIDS services, which at times do not receive sufficient priority.

**2009**

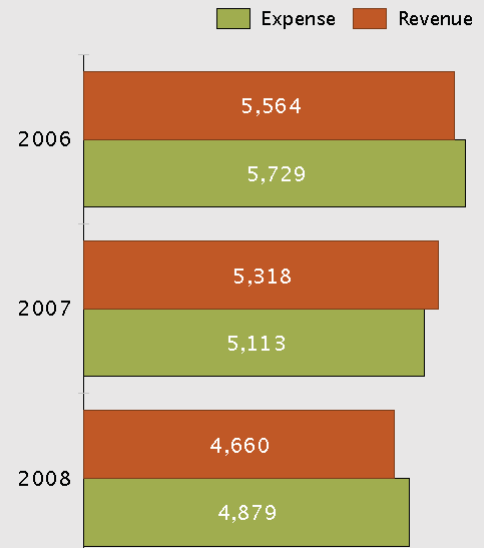
**Bienestar Human Services  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

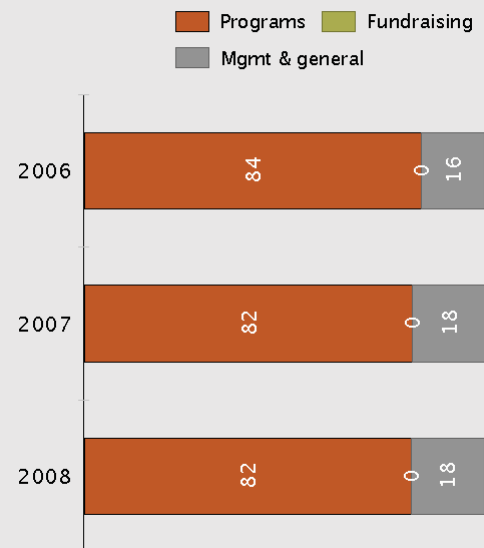
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	4.9	6.6	6.6
Days of working capital	146	177	170
Working capital (\$000)	\$2,271	\$2,465	\$2,268
Average daily cash expense (\$000)	\$15.5	\$13.9	\$13.3
Fundraising expense (cash only) to raise \$1	N/A	N/A	N/A
Total revenue raised through development efforts (\$000)	N/A	N/A	N/A
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	50	67	53
Number of individual donors who gave > \$1,000	18	9	9
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	N/A	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	N/A
Percent of total revenue from top 10 contributors	N/A	4%	1%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 169	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$721,499	\$1,019,052	\$398,429
Net cash provided (used) by operating activities	340,204	-174,537	164,015
Net cash provided (used) by investing activities	-42,651	-446,085	175,143
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>\$297,553</u>	<u>-\$620,622</u>	<u>\$339,158</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$1,019,052</u>	<u>\$398,430</u>	<u>\$737,587</u>

**2009**

**Bienestar Human Services**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$1,019,052		\$398,430		\$737,587
Investments	561,428		1,164,785		895,982
Other current assets	1,015,580		1,138,848		881,705
Net fixed assets	51,544		61,946		38,833
Other long-term assets	27,197		28,197		28,197
<b>Total Assets</b>	<b>\$2,674,801</b>		<b>\$2,792,206</b>		<b>\$2,582,304</b>
<b>Liabilities</b>					
Current liabilities	\$324,647		\$237,261		\$247,159
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$324,647</b>		<b>\$237,261</b>		<b>\$247,159</b>
<b>Net Assets</b>					
Unrestricted	2,350,154		2,554,945		2,335,145
Temporarily restricted	0		0		0
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$2,674,801</b>		<b>\$2,792,206</b>		<b>\$2,582,304</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$146,404	3%	\$223,005	4%	\$349,512	8%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	193,199	3%	241,685	5%	139,500	3%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	4,968,607	89%	4,592,344	86%	4,218,971	91%
Program income	0	0%	0	0%	0	0%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
<b>Net fundraising event income</b>	<b>\$0</b>		<b>\$0</b>		<b>\$0</b>	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	87,916	2%	236,553	4%	-61,025	-1%
Other revenue	168,330	3%	24,497	0%	12,651	0%
<b>Total Revenue</b>	<b>\$5,564,456</b>		<b>\$5,318,084</b>		<b>\$4,659,609</b>	
<b>Expenses</b>						
Program services	4,768,986	83%	4,160,055	81%	3,967,120	81%
Fundraising	0	0%	0	0%	0	0%
Management and general	898,086	16%	918,184	18%	889,177	18%
<b>Total cash expenses</b>	<b>\$5,667,072</b>		<b>\$5,078,239</b>		<b>\$4,856,297</b>	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	62,127	1%	35,055	1%	23,113	0%
<b>Total non-cash expenses</b>	<b>\$62,127</b>		<b>\$35,055</b>		<b>\$23,113</b>	
<b>Total Expenses</b>	<b>\$5,729,199</b>		<b>\$5,113,294</b>		<b>\$4,879,410</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$164,743</b>		<b>\$204,790</b>		<b>-\$219,801</b>	

**2009**

**Bienestar Human Services  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
8	50%	50%	0%	\$1,200 annually	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	0%	100%	0%	0%

Bienestar Human Services  
5326 E. Beverly Blvd.  
Los Angeles, CA 90222  
323-727-7896  
www.bienestar.org

Additional Locations

Hollywood  
East LA  
South LA  
Long Beach  
El Monte  
Van Nuys  
San Bernardino  
San Diego  
Coachella

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.0	9.4	18.0
Compensation	\$55,000	\$91,341	\$141,962

Legal Names

Bienestar Human Services, Inc. - 501(c)(3)

Contact

Oscar De La O  
President & CEO  
odelao@bienestar.org

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
81	66	15	69%	31%	12%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	2%	0%	98%	0%	0%

*Note: Board and staff data as of 6/24/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Growth** - Bienestar's strategic growth has led to the opening of 11 service centers across 4 counties in southern CA. We recently relocated our Riverside County facility from Indio to Coachella to provide better access to our target communities. Addition of HIV testing in San Diego has netted high seroprevalence in a needy community. We anticipate continued growth into additional areas with disproportionately high rates of HIV/AIDS and those deemed highly at-risk.
- Funding** - Bienestar continues to diversify its funding sources, tapping into the private sector to make up for reduced public dollars. We welcome collaborations with other organizations, foundations, and corporations.
- Website** - For more information on Bienestar, please visit our newly updated website at www.Bienestar.org.



**2009**

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Standard Annual Report**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1973	Chicago Illinois Midwest
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$5,211,146	56
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

In a safe and nurturing environment, Center on Halsted serves as a catalyst for the LGBT community that links and provides community resources and enriches life experiences.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Establish COH as a premier community-based organization through enhanced programming and communication through:
  - Programming that is evidence-based, driven by outcome metrics and represents best practices which articulates standards, responds to stakeholder needs, and consistently integrates health, wellness and prevention message;
  - A communication strategy that effectively communicates COH programming, as measured by a 10.4% reduction in community members identifying "No [COH] programs of interest to me";
  - An instructive visitor experience in which 90% of patrons positively know how to engage in, and navigate, the Center;
  - A formal volunteer training program; and,
  - Continually address the increasing problem of homelessness amongst LGBT Youth.
  
2. Establish COH as a convener for the LGBT community and a preferred partner for those who deliver services to the community, as evidenced by:
  - Establishing delineated pathways to partnerships with clear guidelines and criteria; and,
  - A year-over-year increase in the proportion of programming provided through partnerships.
  
3. Achieve highest standards in staff and Board performance by:
  - The continued cultivation of a diverse Board and staff with the capacity (talent, skill, knowledge and experience) to carry out the mission and vision of the Center;
  - Strengthening internal communications, so that 75% of staff agrees that internal communication is effective, consistent and informing;
  - There is a formal leadership development process in place for supervisory and management staff and Board leadership;
  - 100% of the Board participates in fundraising for either the give or get program;
  - There is an annual evaluation process for the Board; and,
  - There is a transparent process for the evaluation of the Executive Director.
  
4. Increase financial capacity by:
  - Creating a balanced budget each year, with contingent reserves set aside for capital needs;
  - Securing 15% of the operating revenue through earned income;
  - Establishing a \$1 million operating reserve;
  - Leveraging technology in staff driven and professional fundraising;
  - Establishing a planned giving program;
  - Converting 50% of capital campaign donors into annual fund contributors; and,
  - Acquiring 50% new contributors who did not contribute to the capital campaign.

**2009**

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One-year Key Planned Accomplishments for FY2009

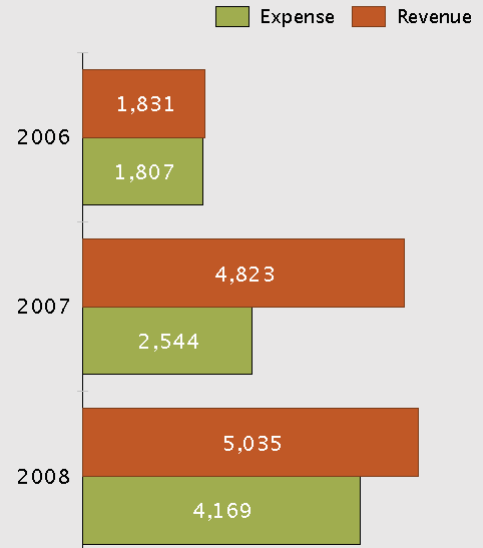
1. Deliver 143 high-quality educational training programs and 3 new Web-based resources in areas of COH competence. Web resources may include resource guides, on-line training, or webinars for consumers, providers, and other institutions.
2. Develop a comprehensive fundraising plan for FY 2008-2009 by June 15th and begin to execute the plan by July 1, 2009 to grow the Center's fundraising capacity and meet the approved revenue budget.
3. Enhance COH's Human Resource function by completing an evaluation and refinement of hiring, orientation practices, performance evaluation practices, and benefit offerings.
4. Develop process for creating and maintaining two new external co-opportunities per program within identified participant gaps. Develop plan for leveraging additional resources from each internal resident partner.
5. Identify and prioritize enactment of programmatic best practices, including mechanisms for ongoing review, participation metrics and annual diversity goals resulting in a comprehensive policy and procedure manual for all COH programs.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

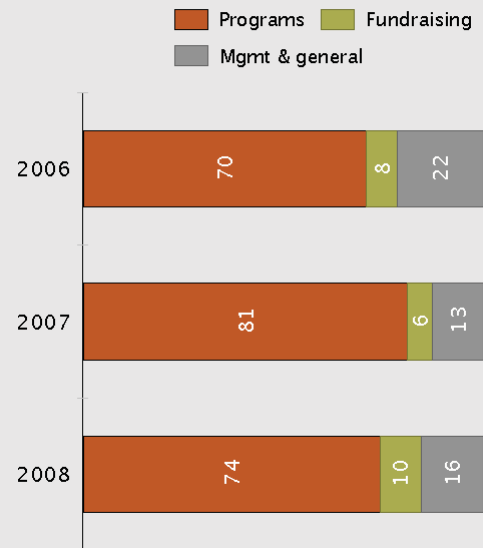
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.4	1.1	1.0
Days of working capital	571	360	310
Working capital (\$000)	\$2,742	\$2,313	\$3,030
Average daily cash expense (\$000)	\$4.8	\$6.4	\$9.8
Fundraising expense (cash only) to raise \$1	\$0.08	\$0.06	\$0.10
Total revenue raised through development efforts (\$000)	\$1,687	\$2,764	\$4,303
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	836	1,389	666
Number of individual donors who gave > \$1,000	280	428	178
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	N/A	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	1,080	1,271	1,020
Percent of total revenue from top 10 contributors	13%	11%	33%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 20,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$22,734	\$135,249	\$243,261
Net cash provided (used) by operating activities	3,534,189	2,698,558	722,450
Net cash provided (used) by investing activities	-4,254,592	-6,420,874	-889,362
Net cash provided (used) by financing activities	832,918	3,830,328	-50,000
Net increase (decrease) in cash	\$112,515	\$108,012	-\$216,912
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$135,249</u>	<u>\$243,261</u>	<u>\$26,349</u>

**2009**

**Center on Halsted  
Standard Annual Report**

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**Statement of Financial Position**

	<i>Audited</i> 2006	<i>Audited</i> 2007	<i>Audited</i> 2008
<i>Assets</i>			
Cash and cash equivalents	\$135,249	\$243,261	\$26,349
Investments	707,632	750,733	1,050,540
Other current assets	3,919,964	2,253,567	3,000,973
Net fixed assets	15,160,917	21,945,473	21,936,863
Other long-term assets	1,131,663	2,104,811	1,640,864
<b>Total Assets</b>	<b>\$21,055,425</b>	<b>\$27,297,845</b>	<b>\$27,655,589</b>
<i>Liabilities</i>			
Current liabilities	\$2,021,142	\$934,569	\$1,047,885
Long-term debt	2,740,000	2,152,923	1,730,907
Other long-term liabilities	475,000	4,800,000	4,600,000
<b>Total Liabilities</b>	<b>\$5,236,142</b>	<b>\$7,887,492</b>	<b>\$7,378,792</b>
<i>Net Assets</i>			
Unrestricted	6,669,917	16,304,811	17,078,259
Temporarily restricted	9,149,366	3,105,542	3,198,538
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$21,055,425</b>	<b>\$27,297,845</b>	<b>\$27,655,589</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$344,024	19%	\$463,292	10%	\$858,726	17%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	20,923	1%	722,367	15%	18,091	0%
Foundation contributions	190,239	10%	681,541	14%	1,487,563	30%
Corporate contributions/Non-event sponsorships	19,865	1%	153,822	3%	138,611	3%
Government funding	697,625	38%	893,587	19%	969,310	19%
Program income	81,429	4%	88,783	2%	133,210	3%
Fundraising event income	628,102	34%	1,289,498	27%	1,252,668	25%
Less costs of direct benefit to donors	-213,972	-12%	-717,471	-15%	-422,147	-8%
Net fundraising event income	\$414,130		\$572,027		\$830,521	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	19,064	1%	209,579	4%	91,516	2%
Other revenue	43,417	2%	1,037,780	22%	507,433	10%
<b>Total Revenue</b>	<b>\$1,830,716</b>		<b>\$4,822,778</b>		<b>\$5,034,981</b>	
<i>Expenses</i>						
Program services	1,253,029	69%	1,876,200	71%	2,568,385	62%
Fundraising	142,926	8%	160,428	6%	420,305	10%
Management and general	356,285	20%	311,390	12%	575,200	14%
Total cash expenses	\$1,752,240		\$2,348,018		\$3,563,890	
Non-cash expenses						
In-kind	25,203	1%	187,075	7%	18,091	0%
Depreciation	35,897	2%	112,831	4%	586,556	14%
Total non-cash expenses	\$61,100		\$299,906		\$604,647	
<b>Total Expenses</b>	<b>\$1,813,340</b>		<b>\$2,647,924</b>		<b>\$4,168,537</b>	
Capital campaign net revenue	7,086,112		1,416,216		0	
<b>Change in Net Assets</b>	<b>\$7,103,488</b>		<b>\$3,591,070</b>		<b>\$866,444</b>	

**2009**

**Center on Halsted  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
21	57%	43%	0%	\$5,000 Annual Support; \$5,000 Special Events	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
10%	5%	75%	10%	0%	0%

Center on Halsted  
3656 N. Halsted  
Chicago, IL 60613  
773-472-6469  
<http://centeronhalsted.org/>

Additional Locations

None

**Senior Management Profile**

Legal Names

Center on Halsted - 501(c)(3)

Contact

Modesto Valle  
Executive Director  
[mvalle@centeronhalsted.org](mailto:mvalle@centeronhalsted.org)

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.5	4.3	10.0
Compensation	\$70,000	\$95,687	\$155,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
56	44	12	59%	41%	2%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
16%	5%	63%	13%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

For 36 years, Center on Halsted (Center) has provided vital services to Chicago's LGBT community, beginning as an information clearinghouse and a safe meeting space for our community members, named Gay Horizons in 1973. Through education, outreach, counseling, and advocacy services, trained volunteers and professionals, Gay Horizons assisted individuals cope with an often-hostile world, bolster their sense of self-worth, connect to community, and lead more productive, healthier lives.

In June 2007, Center on Halsted opened the doors of a permanent home for the LGBT community at 3656 North Halsted. The 175,000 square foot facility includes 40,000 square feet of retail space for Whole Foods Market, two levels of underground parking, and 65,000 square feet of community, programming and administrative space for the Center including: a full-size gymnasium, a 160-seat black-box theater, a 20-station cyber-center, 12 community meeting rooms, two art galleries, a reading room, toddler play room, a senior center, and a youth space.

This new physical capacity enabled Center on Halsted to expand the traditional community services from Horizons including the Youth Program, Elder Program, mental health, and the HIV prevention program. Individual mental health sessions are now complemented by comprehensive case management. The Center's HIV Prevention and outreach efforts are strengthened by being the home of the State of Illinois' HIV/AIDS/STD Hotline, and demonstrated in testing over 1,500 residents last year alone.

The Center has also been able to launch new programming and services in direct response to community member physical, social and emotional needs. The Anti-Violence Program provides support to victims of hate crime and same-sex domestic violence. The Legal Services Program provides free legal support for LGBT community members. Community and cultural programming has expanded to include arts partnerships with local, regional and national artists and arts organizations; a professional development series; and youth, senior and family recreational programming. The Sexual Orientation and Gender Institute (SOGI) trains mental health providers, from across the nation, on effectively working with members of the LGBT community.

For additional information, please contact the Center on Halsted or visit our website at [www.centeronhalsted.org](http://www.centeronhalsted.org).



2009

**CenterLink**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1994	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Capacity-Building/Research
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$290,959	2
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

To support the development of strong, sustainable LGBT community centers and to build a unified center movement.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- Diversity & Inclusion:** Create long-term, sustainable diversity and inclusion initiatives in LGBT community centers and promote wider systemic change in LGBT movement leadership.
- Capacity Building and Technical Assistance:** Provide community centers with:
  - In-person trainings meeting the particular needs of local center board and staff
  - Online webinar training
  - National conferences for center EDs and board members to learn about fundraising, communications and marketing, and organizational management in a bad economy
  - Templates, resources, best practices, and model policies for existing and start-up centers
- Advocacy:** Provide community centers with information on national legislative issues (e.g., hate crimes, employment nondiscrimination, Don't Ask Don't Tell, safe schools, and federal funding opportunities).
- Mental Health Capacity Building:** In new partnership with Johnson Family Foundation, provide technical assistance (TA) and support for 6 centers, which increases quality and variety of LGBT community centers' mental health services, strengthens their overall organizational capacity and promotes communication and collaboration among leading providers of mental health services to LGBT populations.
- Center Movement Building:** Raise awareness of community centers' community presence, available services, and movement-building strengths.

One-year Key Planned Accomplishments for FY2009

- Host 3rd Annual Community Center EDs Summit, provide training and networking opportunities for 45 EDs and board leaders from across the US.
- Facilitate onsite capacity-building consultations/retreats for 5 community center board and/or staff members. Conduct 450 telephone or email consultations.
- With Pipeline Project, host 4 meetings with 16 community centers to identify barriers to leadership for LGBT people of color (POC), strategize ways to enhance their inclusion in movement leadership, and issue a report on the challenges community centers face in improving leadership diversity and inclusion. Later expand cohort to 5 more centers.
- With national partners and local community centers, work to pass federal hate crimes and employment non-discrimination legislation.
- Support development/implementation of individualized, 3-year TA plans for sustainable LGBT mental health services for 2 community centers.
- Create national LGBT Center Awareness Day highlighting the vital role that centers play in LGBT communities' health, empowerment, and unity.

**2009**

**CenterLink**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2008

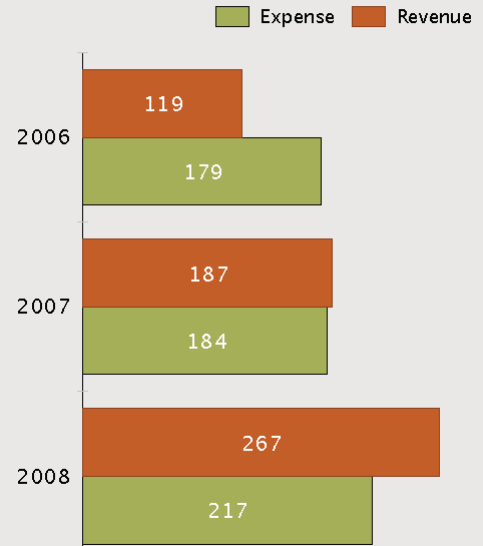
- Hosted 2nd Annual EDs Summit, providing practical tools for sustaining community centers and sharing best practices, for 52 attendees (up 21% from 2007).
- With LGBT Community Center of New York, provided 170 community centers with promotional materials and assistance to register LGBT voters.
- Facilitated in-person board and staff training at Utah Pride Center, LGBT Center of Central Florida, and for community center exploratory committee in Savannah, GA. Provided one-on-one phone and Internet coaching to 412 community center leaders.
- Launched collaboration with the Pipeline Project to identify barriers to POC leaders and strategize ways to enhance their inclusion in LGBT movement leadership. Recruited 16 community centers to participate in 4 regional cohorts.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

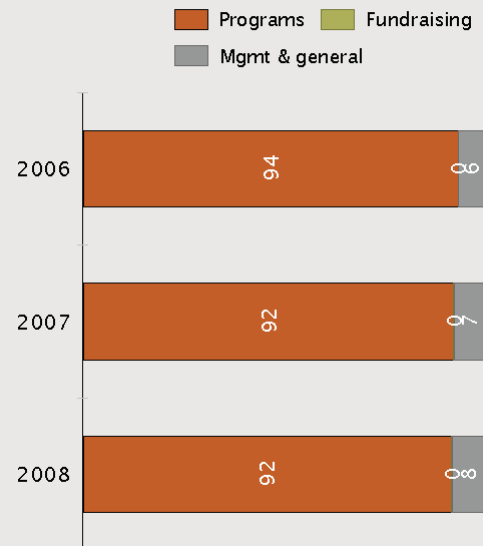
**Indicators of Financial Health & Efficiency**

For the fiscal year ending December 31

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	7.6	8.8	29.1
Days of working capital	182	191	246
Working capital (\$000)	\$85	\$89	\$137
Average daily cash expense (\$000)	\$0.5	\$0.5	\$0.6
Fundraising expense (cash only) to raise \$1	N/A	\$0.00	\$0.00
Total revenue raised through development efforts (\$000)	N/A	\$164	\$225

Indicators of Contributor Base

Number of individual donors who gave > \$35	9	12	16
Number of individual donors who gave > \$1,000	N/A	1	5
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	11%	33%
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	N/A
Percent of total revenue from top 10 contributors	86%	78%	72%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 1,757	

**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$75,222	\$40,226	\$32,620
Net cash provided (used) by operating activities	-34,996	-7,606	71,347
Net cash provided (used) by investing activities	0	0	-3,118
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>-\$34,996</u>	<u>-\$7,606</u>	<u>\$68,229</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$40,226</u>	<u>\$32,620</u>	<u>\$100,849</u>

**2009**

**CenterLink  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<i>Assets</i>					
Cash and cash equivalents	\$40,226		\$32,620		\$100,849
Investments	0		0		0
Other current assets	50,095		59,916		39,692
Net fixed assets	678		199		2,311
Other long-term assets	0		150		150
<b>Total Assets</b>	<b>\$90,999</b>		<b>\$92,885</b>		<b>\$143,002</b>
<i>Liabilities</i>					
Current liabilities	\$5,293		\$3,705		\$3,467
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$5,293</b>		<b>\$3,705</b>		<b>\$3,467</b>
<i>Net Assets</i>					
Unrestricted	45,706		39,180		79,952
Temporarily restricted	40,000		50,000		59,583
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$90,999</b>		<b>\$92,885</b>		<b>\$143,002</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$7,266	6%	\$25,596	14%	\$63,957	24%
Bequests	0	0%	0	0%	0	0%
Dues	9,030	8%	23,100	12%	35,325	13%
In-kind contributions	7,545	6%	12,998	7%	15,618	6%
Foundation contributions	95,000	79%	125,000	67%	145,000	54%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	6,800	3%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	656	1%	306	0%	580	0%
<b>Total Revenue</b>	<b>\$119,497</b>		<b>\$187,000</b>		<b>\$267,280</b>	
<i>Expenses</i>						
Program services	160,074	90%	156,372	85%	185,887	86%
Fundraising	0	0%	626	0%	648	0%
Management and general	10,739	6%	13,051	7%	16,884	8%
Total cash expenses	\$170,813		\$170,049		\$203,419	
Non-cash expenses						
In-kind	7,545	4%	12,998	7%	12,500	6%
Depreciation	479	0%	479	0%	1,006	0%
Total non-cash expenses	\$8,024		\$13,477		\$13,506	
<b>Total Expenses</b>	<b>\$178,837</b>		<b>\$183,526</b>		<b>\$216,925</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$59,340</b>		<b>\$3,474</b>		<b>\$50,355</b>	

**2009**

**CenterLink  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
20	35%	65%	5%	Each Board member has a Give/Get fundraising requirement of \$2,500	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
5%	0%	90%	0%	0%	5%

**Locations & Contact**

CenterLink  
PO Box 24490  
Fort Lauderdale, FL 33307  
954-765-6024  
www.lgbtcenters.org

Additional Locations

New York City

Legal Names

CenterLink, Inc. - 501(c)(3)

Contact

Terry Stone  
Executive Director  
terry@lgbtcenters.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.5	1.8	3.0
Compensation	\$55,000	\$71,600	\$88,200

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
2	2	0	100%	0%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	50%	50%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

CenterLink was founded in 1994 as a member-based coalition to support the development of strong, sustainable LGBT community centers. A fundamental goal of the organization's mission is to help build the capacity of these centers to address the social, cultural, health, and political advocacy needs of LGBT community members. For over a decade, CenterLink has played an important role in supporting the growth of LGBT centers and addressing the challenges they face by helping them to improve their organizational and service delivery capacity and access public resources.

There are 180 LGBT community centers in 45 states, the District of Columbia and Canada, with new centers forming on a regular basis. These centers serve a vital and multi-faceted role in many communities. They are often the only staffed nonprofit LGBT presence in the area and the 1st point of contact for people seeking information, coming out, accessing services, or organizing for social change. Whether they provide direct services, educate the public or organize for social change, community centers work more closely with their LGBT constituency and engage more community leaders and decision-makers than any other LGBT network in the country, which points to the enormous impact community centers have on the health and lives of LGBT people.

In collaboration with the Movement Advancement Project, CenterLink produced the 2008 Community Center Survey Report. This report provides the most comprehensive picture of LGBT community centers' staffs and boards, program priorities, constituencies, fundraising, budgets, and technical assistance needs since CenterLink's founding. For a copy of the report, go to [www.lgbtcenters.org](http://www.lgbtcenters.org).

We continue to intensify our efforts to build sustainable LGBT community centers to ensure that LGBT people have access to, and benefit from, identity affirming and life-saving services and programs.



2009

**COLAGE**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1990	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$750,000	7
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Build a national movement of children, youth, and adults with one or more LGBTQ parents that works toward social justice through youth empowerment, leadership development, education, and advocacy.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

COLAGE's 2008-2012 strategic plan (executive summary available upon request) identifies 5 strategic priorities:

- Social Justice** - Implement our social justice commitments by developing anti-oppression consciousness and behavior at all organizational levels (board to local volunteers) through annual trainings and adoption of conflict resolution protocols. Launch and sustain Voices Raised initiative to deepen engagement and leadership of COLAGERS of color with LGBTQ parents of color within the organization and empower COLAGERS of color to advocate for themselves and their families at the local, state, and national levels. Launch and sustain fellowship program to conduct community based research and create programming, resources, partnerships, and campaigns addressing the needs and aspirations of targeted and emerging COLAGE populations. In 2007-8 focus on people with transgender parents; in 2009-2010 focus on people born through donor insemination; in 2010-2011 focus on people transracially or transnationally adopted by an LGBTQ parent, in 2011-2012, TBD.
- Partnership** - Through partnerships with local, state, and national advocacy organizations, involve youth and adult COLAGERS in relevant policy advocacy opportunities in at least 4 states each year, and in federal testimony and constituent visits. State priorities include passage of LGBT family inclusive safe schools legislation in MN, maintaining marriage equality in IA, achieving marriage equality in CA and NY, overturning the FL adoption ban (& helping ensure further discriminatory parenting restrictions are not put in place). At the federal level, priorities include passage of the Safe Schools Improvement Act, Employment Non-Discrimination Act, and universal health care.
- Local Work/Grassroots Base Building** - Train and mobilize 400+ youth and adult COLAGE members and constituents annually, building a mobilizable base, particularly for the 2010 and 2012 election and legislative cycles. Provide field training technical support to 30+ chapters across the country annually; build chapter capacity by organizing biennial chapter institute and 2+ regional gatherings over the next 5 years, and introducing resources (e.g., curriculum, brand collateral, mini-grants). Build national network by affiliating 3+ new chapters each year. Engage wider geographic diversity of national constituency by creating new trainings/programs (e.g., Speak OUT Camp, new regional family events in odd-numbered years), rotating location of annual/biennial trainings/programs (e.g., Chapter Institute) when possible, and leveraging new partnerships with local, regional, and state community organizations.
- Communications** - Build our communications capacity by hiring staff and developing a branding strategy and uniform organizational messaging so that COLAGE is seen as the primary national expert on the needs and experiences of people with LGBTQ parents. Upgrade our website to increase accessibility of information and resources, including translating key resources into Spanish.
- Organizational Infrastructure** - Build organizational infrastructure by maintaining 13+ board members annually, growing our staff from 5.5 to 9 by 2012, upgrading our contact management system to support 15,000+ records, expanding our donor base through member-driven fundraising campaigns and by gaining 2+ new major (individual, corporate, or institutional) funders annually.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

One-year Key Planned Accomplishments for FY2009

1. Sponsor and conduct peer-based grassroots activist and leadership development trainings to engage 400+ youth and adults with LGBTQ parents at 5+ day-long to week-long regional or national conferences, events, and LGBTQ family gatherings.
2. Advocate in 4-6 states and at federal level for safe schools, family recognition, non-discrimination, and reproductive rights (including adoption) for LGBT families through public education and legislative testimony by COLAGERS; submit amicus briefs in precedent-setting legal cases; and work in coalition with local, state, and national partners.
3. Engage 30+ COLAGERS in a new, intensive Speak OUT Activist Camp in the South to build public speaking, advocacy, and leadership skills; maintain an active base of Speak OUT Program members in 30+ states for media and advocacy mobilizations.
4. Launch "Voices Raised," a new initiative to engage and empower COLAGERS of color with at least 1 LGBTQ parent of color, and participate in collaborations that address issues relevant to COLAGERS of color.
5. Launch a new fellowship addressing issues related to donor insemination. Release second edition of KOT Resource Guide.
6. Upgrade database to improve programmatic and fundraising data management.

Key Accomplishments in FY2008

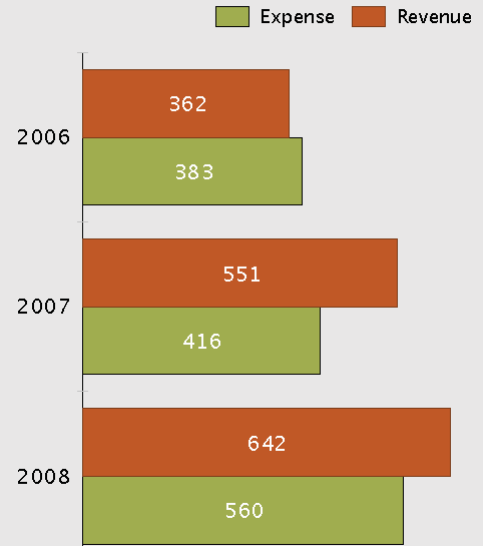
1. Conducted peer-based grassroots activist and leadership development trainings for 400+ youth/adults with LGBT parents, including Family Week events in MI and MA, Rainbow Families of MN, Rainbow Families DC, and the LA Center's Family Services Conference.
2. Mobilized COLAGERS to participate in advocacy and public education in CA, CT, FL, and NJ for family equality, gender equality, and/or safe schools. More than doubled subscribers to NetNews e-mail news and action alerts.
3. Testified in *Healthy People 2020* process and MA gender identity nondiscrimination judicial hearing; participated actively in United ENDA; advocated for marriage equality in CT and CA; and submitted several amicus briefs. Secured positive mainstream coverage of COLAGERS/COLAGER issues, including representation in the critically acclaimed F/X reality series 30 Days (2.4 million weekly viewers).
4. Published and widely distributed groundbreaking resource for people with transgender parents; sustained and grew Kids of Trans programming; and increased visibility of people with transgender parents through presentations and media interviews.
5. Strengthened and deepened chapter work through new toolkit addressing COLAGE's social justice commitments and intersectional framework; new chapter affiliation agreement clarifying legal/fiscal arrangements and enabling chapters to enhance fundraising capacity; and Chapter Institute providing intensive training and networking to leaders of 14 chapters. Launched regular conference calls with other national organizations to share best practices in supporting chapters.
6. Partnered on American Family Outing, which organized meals and dialogue between leaders and families from 6 megachurches and LGBTQ families. Presented at regional and national conferences for professionals who work with children, youth, and families (e.g., CA Teacher's Association, National Middle School Association, American Family Therapy Association, and American Psychological Association).
7. With GLSEN and FEC, published landmark study of harassment and discrimination against LGBT parents and their children in schools.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

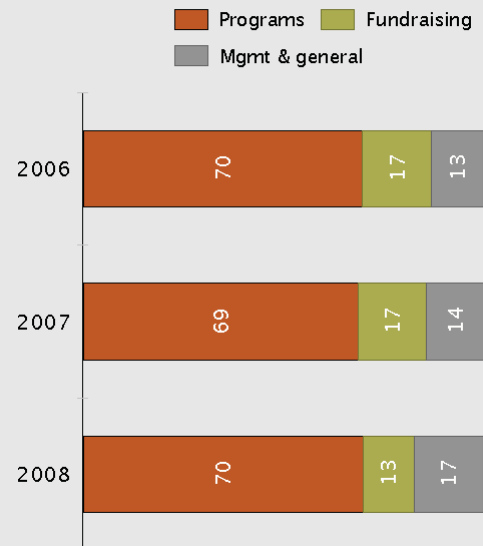
**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	14.3	22.6	20.1
Days of working capital	344	439	403
Working capital (\$000)	\$359	\$497	\$582
Average daily cash expense (\$000)	\$1.0	\$1.1	\$1.4
Fundraising expense (cash only) to raise \$1	\$0.22	\$0.14	\$0.12
Total revenue raised through development efforts (\$000)	\$300	\$490	\$598

Indicators of Contributor Base

Number of individual donors who gave > \$35	537	576	392
Number of individual donors who gave > \$1,000	24	34	21
Donor turnover (gave > \$35 in prior FY & not this FY)	55%	58%	53%
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	N/A
Percent of total revenue from top 10 contributors	66%	53%	77%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 18,296	

**Statement of Cash Flows**

	<u>Reviewed</u> <u>2006</u>	<u>Reviewed</u> <u>2007</u>	<u>Reviewed</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$319,765	\$309,026	\$355,852
Net cash provided (used) by operating activities	19,292	52,036	138,245
Net cash provided (used) by investing activities	-8,307	-5,210	-1,798
Net cash provided (used) by financing activities	-21,724	0	0
Net increase (decrease) in cash	-10,739	\$46,826	\$136,447
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$309,026</u>	<u>\$355,852</u>	<u>\$492,299</u>

**2009**

**COLAGE**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Reviewed</i> <u>2006</u>		<i>Reviewed</i> <u>2007</u>		<i>Reviewed</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$309,026		\$355,852		\$492,299
Investments	11,588		10,295		12,093
Other current assets	70,247		156,537		112,552
Net fixed assets	2,862		5,097		2,320
Other long-term assets	9,215		3,840		3,092
<b>Total Assets</b>	<b>\$402,938</b>		<b>\$531,621</b>		<b>\$622,356</b>
<b>Liabilities</b>					
Current liabilities	\$21,689		\$15,718		\$24,533
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$21,689</b>		<b>\$15,718</b>		<b>\$24,533</b>
<b>Net Assets</b>					
Unrestricted	344,682		380,608		483,361
Temporarily restricted	26,272		125,000		104,167
Permanently restricted	10,295		10,295		10,295
<b>Total Liabilities and Net Assets</b>	<b>\$402,938</b>		<b>\$531,621</b>		<b>\$622,356</b>

**Statement of Activities**

	<i>Reviewed</i> <u>2006</u>		<i>Reviewed</i> <u>2007</u>		<i>Reviewed</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$109,836	30%	\$140,169	25%	\$163,367	25%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	775	0%	0	0%	30,000	5%
Foundation contributions	185,050	51%	344,435	63%	389,732	61%
Corporate contributions/Non-event sponsorships	2,395	1%	3,189	1%	13,921	2%
Government funding	0	0%	0	0%	0	0%
Program income	55,568	15%	51,323	9%	35,601	6%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	2,286	1%	2,615	0%	1,403	0%
Investment income	5,761	2%	8,974	2%	8,334	1%
Other revenue	0	0%	0	0%	0	0%
<b>Total Revenue</b>	<b>\$361,671</b>		<b>\$550,705</b>		<b>\$642,358</b>	
<b>Expenses</b>						
Program services	266,688	70%	283,993	68%	360,675	64%
Fundraising	65,391	17%	70,311	17%	70,627	13%
Management and general	48,940	13%	58,773	14%	96,359	17%
<b>Total cash expenses</b>	<b>\$381,019</b>		<b>\$413,077</b>		<b>\$527,661</b>	
Non-cash expenses						
In-kind	775	0%	0	0%	30,000	5%
Depreciation	1,601	0%	2,974	1%	2,777	0%
<b>Total non-cash expenses</b>	<b>\$2,376</b>		<b>\$2,974</b>		<b>\$32,777</b>	
<b>Total Expenses</b>	<b>\$383,395</b>		<b>\$416,051</b>		<b>\$560,438</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$21,724</b>		<b>\$134,654</b>		<b>\$81,920</b>	

**2009**

**COLAGE**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
14	21%	79%	7%	Required to give and raise funds; collective goals set each year; 2009 goal: \$18,900.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
7%	14%	93%	14%	21%	36%

COLAGE  
1550 Bryant St., Suite 830  
San Francisco, CA 94103  
415-861-5437  
www.colage.org

Additional Locations

None

Legal Names

**Senior Management Profile**

COLAGE - 501(c)(3)

Contact

Beth Teper  
Executive Director  
director@colage.org

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.8	7.6	15.0
Compensation	\$45,500	\$49,000	\$55,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
7	7	0	14%	86%	14%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
43%	0%	86%	14%	14%	14%

*Note: Board and staff data as of 3/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Liquidity Ratio & Working Capital** - COLAGE's cash-on-hand is targeted for strategic growth in both program and long-term organizational capacity and sustainability. We are building the infrastructure for program expansion both locally and nationally which will include the addition of new staff positions. (This note refers to Ratios of Financial Health on p.3.)
- Emergency Reserves** - The COLAGE board of directors has prudently designated \$175,000 and \$139,750 of Unrestricted Net Assets for 3 months' operating cash reserves at December 31, 2009 and 2008, respectively, to ensure the organization's stability through the current recession and any sort of unforeseen disaster. The board designates an increase for the reserve every year our budget grows. (This note refers generally to Financial Health on p.3.)
- Individual Donors** - COLAGE invested in a new contact management system; we identified, secured, and migrated data in October 2008. The migration process yielded a growth in total contacts and transparency in contact relationships which will result in greater individual giving over time. Given the urgency of the current economic recession, during a momentous election year, some donors reduced their giving to COLAGE. At the same time, as you can see, the amount raised from top 10 sources increased and our overall annual income grew.
- Percent of Revenue from top 10 contributors** - COLAGE succeeded in attracting significant new & increased gifts in 2008, including a 2-year grant from the Ford Foundation, a special grant to focus on marriage education in CA, an in-kind service grant from Taproot Foundation to design and migrate data to our new contact management system, and a dramatically increased gift from an individual donor. These large gifts position us to launch our anticipated strategic growth and effectiveness in the coming years. COLAGE recognizes and values the need to diversify our funding base for long-term sustainability. (This note refers to the Indicators of Contributor Base on p.3.)



**2009**

**Compass, Inc.**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1988	Palm Beach County
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,222,401	14
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

To diminish stereotypes by challenging long-standing misconceptions about the character of the LGBT community. We accomplish this by emboldening our youth, promoting pride in our community, and acting as an educator, advocate, health service provider, and focal point for community organizing. As good neighbors, effective partners, and respected participants in our civic responsibilities, Compass promotes awareness of the caring nature of our diverse community.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Successfully complete 3-year capital campaign to ensure Compass' long-time vitality.
2. Expand programming to include women's health initiatives, additional mental health services, and programs addressing needs of an aging gay population.
3. Create institute and/or foundation to expand Compass' influence throughout FL and to provide resources to increase and improve FL's community center network.
4. Expand outreach activities to increase participation by 30% over next 5 years.
5. Develop strategic plan to expand reach of our community organizing by partnering with local, state and national organizations.

One-year Key Planned Accomplishments for FY2010

1. Establish Wellness Empowerment Series for entire community on health-related topics such as HIV education/prevention, women's health, nutrition, mental health and aging.
2. Implement new CDC-approved Social Networking Strategies for HIV testing and prevention, proving how Compass continues as FL's trusted leader in HIV prevention and education.
3. Introduce dedicated Youth Drop-In Center open daily to LGBTQ youth, families and allies; will include after-school help, educational trainings, support, social networking and mentoring.
4. Develop formal internship program under supervision of licensed clinical social worker, under which partnering colleges/universities will help increase Compass' capacity to serve local community.
5. Institute formal, professional volunteer program to further meet community needs while providing opportunities for personal and professional growth.
6. Increase community service programs by 25% including support groups in gap areas (e.g., new LGBT bereavement, inter-faith, and athletic groups).
7. Secure 3+ new funders for expansion of social services.
8. Publish monthly "issues" column by Compass CEO in South Florida Sun Sentinel, expanding LGBTQ community's visibility.
9. Begin initial planning and design of "Compass Institute," which will provide community with opportunities for professional and educational empowerment.

**2009**

**Compass, Inc.**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

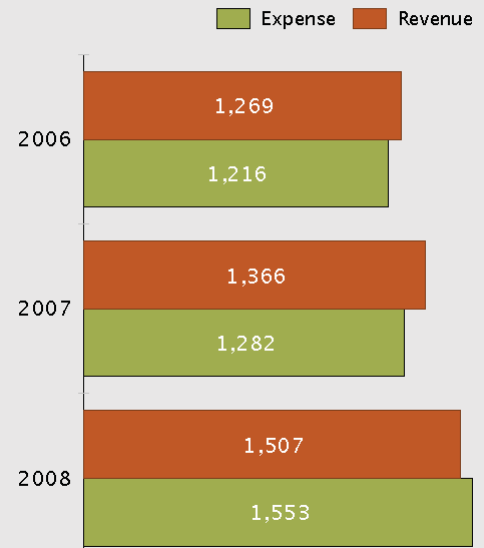
1. Successfully completed phase 1 of capital campaign, raising \$1.5 million to renovate and upgrade a landmark building. Begin phase 2, entitled "Legacy", based on feedback from major stakeholders at 2006 retreat.
2. Rehabilitated vacated, city-owned facility in heart of downtown Lake Worth into award-winning, state-of-the-art community center in epicenter of Palm Beach County's LGBT population. (See <http://canthusinc.com/compass.htm>).
3. Completed 1st year of innovative public-private partnership with City of Lake Worth that has proven both cornerstone and catalyst for revitalization of its downtown urban core. Showcased by Palm Beach County Chapter of League of Cities as "Model of a Private-Public Partnership."
4. Hosted week of festivities for new facility's 3/09 grand opening attended by 300+ key stakeholders: mayors, state representatives, US Congressional aides, countless business leaders, and local gay and non-gay supporters. SF Mayor Gavin Newsom spoke on importance of strengthening all families. Morgan Fairchild addressed private reception of major stakeholder on importance of HIV/AIDS education and services.
5. Hosted Annual Stonewall Ball with highest attendance ever. Special guest speaker Elaine Nobel, 1st openly gay-elected official in US, addressed Compass youth group on importance of LGBT history. *OUT Traveler* and *The Advocate* (cover story) wrote about it.
6. Provided meeting spaces for broad array of government and community organizations.
7. Organized Women's Breast Health Initiative in partnership with Susan G. Komen Foundation, bringing critical breast health education to lesbian community.
8. Upgraded and expanded David Bohnett Cyber Center to 20 work stations averaging 500+ logged users monthly.
9. Partnered with FL's new Organizations United Together (OUT) to implement statewide organizing strategy for LGBT issues. As FL's leading community center, Compass advised other communities on creating their own community centers.
10. Earned Palm Beach Community College's Martin Luther King, Jr. Leadership Award for our work to improve lives of others, particularly the underserved, in e.g., education, diversity, race relations, health services, social justice and economic empowerment. Earned Palm Beach County Clerk and Comptroller office's Best Practices Award for enhancing community's quality of life.
11. Hosted special "Coming Out Day" event called *Come In, Come Out* with a premier showing of the newly created Compass documentary highlighting our 21 year history and the positive outcomes for the LGBT community. At the event we also dedicated a room for our "Coming Out" support group meeting space.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

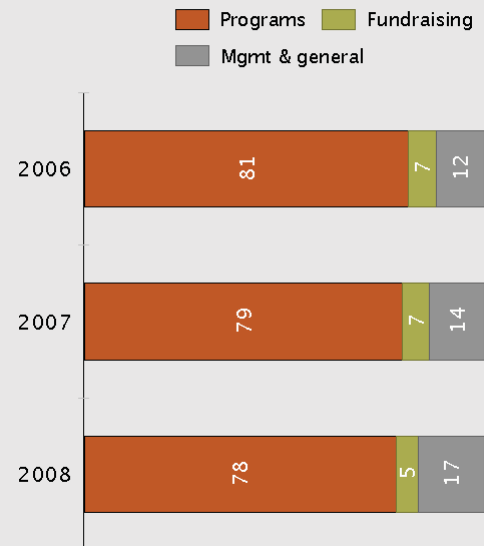
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	2.2	4.0	1.2
Days of working capital	62	89	46
Working capital (\$000)	\$195	\$297	\$181
Average daily cash expense (\$000)	\$3.2	\$3.3	\$4.0
Fundraising expense (cash only) to raise \$1	\$0.23	\$0.20	\$0.20
Total revenue raised through development efforts (\$000)	\$375	\$432	\$423
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	412	542	336
Number of individual donors who gave > \$1,000	35	51	28
Donor turnover (gave > \$35 in prior FY & not this FY)	51%	31%	19%
Number of individuals attending fundraising events (paid > \$100 per person)	219	269	265
Percent of total revenue from top 10 contributors	9%	13%	8%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 7,253	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$84,952	\$187,337	\$116,881
Net cash provided (used) by operating activities	164,366	-57,891	71,424
Net cash provided (used) by investing activities	-57,950	-5,530	-88,774
Net cash provided (used) by financing activities	-4,031	-7,035	-6,145
Net increase (decrease) in cash	\$102,385	-\$70,456	-\$23,495
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$187,337</u>	<u>\$116,881</u>	<u>\$93,386</u>

**2009**

**Compass, Inc.**  
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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<i>Assets</i>					
Cash and cash equivalents	\$187,337		\$116,881		\$93,386
Investments	0		0		0
Other current assets	93,264		208,831		163,615
Net fixed assets	656,896		657,582		698,256
Other long-term assets	5,451		4,947		34,000
<b>Total Assets</b>	<b>\$942,948</b>		<b>\$988,241</b>		<b>\$989,257</b>
<i>Liabilities</i>					
Current liabilities	\$85,222		\$29,180		\$76,221
Long-term debt	216,482		233,253		233,505
Other long-term liabilities	0		0		0
Total Liabilities	\$301,704		\$262,433		\$309,726
<i>Net Assets</i>					
Unrestricted	641,244		700,808		644,924
Temporarily restricted	0		25,000		34,607
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$942,948</b>		<b>\$988,241</b>		<b>\$989,257</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$178,163	14%	\$161,052	12%	\$159,264	11%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	19,968	2%	25,160	2%	78,960	5%
Foundation contributions	0	0%	25,000	2%	0	0%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	853,620	67%	870,569	64%	1,049,944	70%
Program income	0	0%	0	0%	0	0%
Fundraising event income	176,455	14%	220,912	16%	184,936	12%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$176,455		\$220,912		\$184,936	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	41,250	3%	63,735	5%	33,626	2%
Total Revenue	<b>\$1,269,456</b>		<b>\$1,366,428</b>		<b>\$1,506,730</b>	
<i>Expenses</i>						
Program services	970,736	80%	1,000,339	78%	1,190,537	77%
Fundraising	84,374	7%	87,681	7%	82,620	5%
Management and general	103,021	8%	129,254	10%	176,286	11%
Total cash expenses	\$1,158,131		\$1,217,274		\$1,449,443	
Non-cash expenses						
In-kind	19,968	2%	25,160	2%	54,960	4%
Depreciation	37,832	3%	39,430	3%	48,604	3%
Total non-cash expenses	\$57,800		\$64,590		\$103,564	
Total Expenses	<b>\$1,215,931</b>		<b>\$1,281,864</b>		<b>\$1,553,007</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$53,525</b>		<b>\$84,564</b>		<b>-\$46,277</b>	

**2009**

**Compass, Inc.**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
8	88%	25%	0%	Compass board members are required to make a meaningful contribution, attend Compass events and activities and participate in our fundraising efforts.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
12%	0%	88%	0%	0%	0%

Compass, Inc.  
201 North Dixie Highway  
Lake Worth, FL 33460  
561-533-9699  
www.compassglcc.com

Additional Locations

None

Legal Names

Compass, Inc - 501(c)(3)

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.5	4.2	8.0
Compensation	\$45,000	\$62,382	\$99,528

Contact

Tony Plakas  
Chief Executive Officer  
tony@compassglcc.com

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
14	13	1	50%	50%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
14%	0%	57%	29%	0%	0%

*Note: Board and staff data as of 8/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

For additional information please contact Compass or visit our website at [www.compassglcc.com](http://www.compassglcc.com).



2009

**Council for Global Equality**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2008	New York, Washington DC San Francisco
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$779,517	4
<i>Tax Status*</i>	
Fiscal Sponsor - Public Interest Projects	100%

**Mission**

Encourage a clearer and stronger American voice on international LGBT human rights concerns by bringing together international human rights activists, foreign policy experts, LGBT leaders, philanthropists, corporations and political strategists. Council members seek to ensure that representatives of the US use the diplomatic, political and economic leverage available to them to oppose human rights abuses based on sexual orientation, gender identity or gender expression.

\* Percent of latest FY revenue.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Work with US diplomats in approximately ten priority countries per year to encourage systematic demarches (i.e., formal diplomatic approaches), at Ambassadorial (preferred) or Deputy Chief of Mission level, in countries where security forces participate in LGBT human rights abuses, that fail to investigate and punish abuses, or where private homosexual activity between consenting adults is criminalized. Work with US embassies and State Department to strengthen Country Team efforts toward repeal of LGBT-discriminatory laws in these countries. Priority countries will be selected each year based on reporting information in the State Department's annual human rights report and an understanding of countries where the US economic or bilateral relationship suggests greater leverage to achieve results. From year to year, there will be some intended overlap in the list of ten priority countries based on year-end evaluations and indicators of progress.
2. Cause US State Department/Congress to create new job position in State Department responsible for monitoring and responding to LGBT human rights and equality issues. This person would work with embassies and country teams to design and institute a "protection agenda" encouraging consistent reporting and constructive diplomatic responses to human rights abuses against LGBT communities.
3. Cause US embassies and consulates' Mission Strategic Plans to address discrimination and abuse against LGBT communities (in countries where appropriate) and include specific actions to fight LGBT discrimination, strengthen local LGBT groups' capacity/focus, and/or include those groups in civil society outreach in approximately ten priority countries per year. Ensure that US programs to strengthen democracy and civil society abroad include LGBT communities and that USAID and/or State Department funding for civil society, democracy, and rule of law set aside substantial \$ for programs to enhance LGBT equality abroad. Strengthen embassy ties with local LGBT groups to improve results measurement.
4. Cause White House and State Department to begin dialogue with US Chamber of Commerce and leading US multinational corporations on need for American companies to implement workplace policies in overseas offices and factories that reflect core American values including respect for rights of LGBT employees.
5. Cause State Department Bureau of Population, Refugees, and Migration to develop a pilot LGBT refugee resettlement program and ensure the Bureau's efforts to approach foreign partners to offer refugee protections to those fleeing persecution based on sexual orientation or gender identity.

One-year Key Planned Accomplishments for FY2009

1. Strengthen linkages and synergistic work patterns of organizations making up the Council, and create more dynamic website with link to LGBT resource materials tailored to information and reporting needs of US government officials.
2. Engage members of Congress and their staffs to raise awareness and promote consistent response to LGBT concerns abroad through regular committee and affinity-group briefings and inclusion of LGBT concerns in long-anticipated foreign assistance reform in 2009.

**2009**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. Cause Obama Administration to increase State Department's capacity to respond to LGBT human rights abuses through appointment of appropriate staff, institution of regular Department-NGO consultations and inclusion of LGBT groups and issues within existing development assistance funding pools.
4. Launch 2 pilot projects seeking to leverage US corporate leadership on workplace equality in order to promote broader social and legal advances in countries where they do business.
5. Produce and disseminate 2+ academic presentations or think-tank style studies promoting engagement on LGBT issues by often conservative US foreign policy leaders and research institutions.

2009

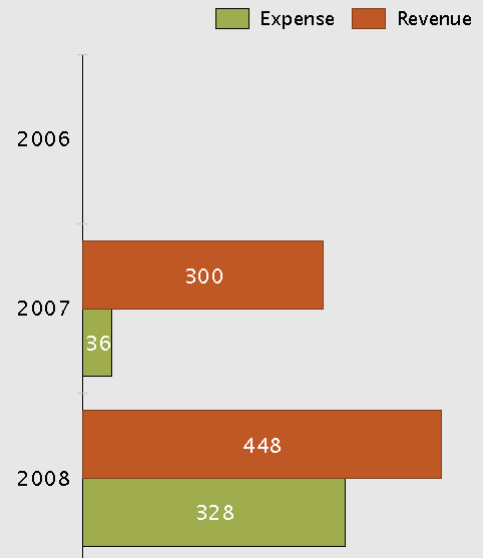
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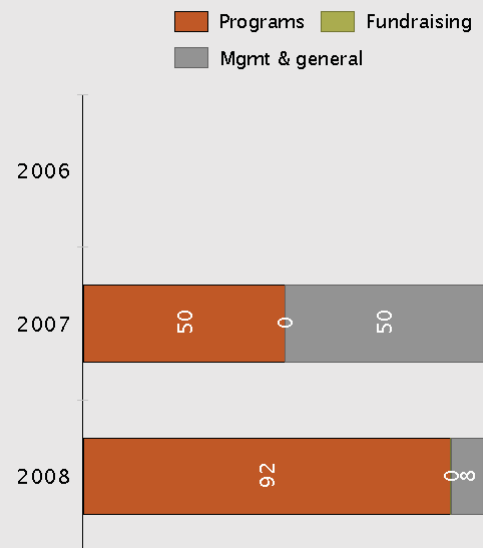
**Indicators of Financial Health & Efficiency**

For the fiscal year ending December 31

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	N/A	N/A	N/A
Days of working capital	N/A	N/A	N/A
Working capital (\$000)	N/A	N/A	N/A
Average daily cash expense (\$000)	N/A	\$0.1	\$0.9
Fundraising expense (cash only) to raise \$1	N/A	N/A	N/A
Total revenue raised through development efforts (\$000)	N/A	N/A	N/A

Indicators of Contributor Base

Number of individual donors who gave > \$35	N/A	0	2
Number of individual donors who gave > \$1,000	N/A	0	0
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	N/A	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	0	0
Percent of total revenue from top 10 contributors	N/A	100%	100%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 1,300	

**Statement of Cash Flows**

	<u>N/A</u> <u>2006</u>	<u>N/A</u> <u>2007</u>	<u>N/A</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	N/A	N/A	N/A
Net cash provided (used) by operating activities	N/A	N/A	N/A
Net cash provided (used) by investing activities	N/A	N/A	N/A
Net cash provided (used) by financing activities	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>
Net increase (decrease) in cash	N/A	N/A	N/A
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>

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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	N/A 2006	N/A 2007	N/A 2008
<u>Assets</u>			
Cash and cash equivalents	N/A	N/A	N/A
Investments	N/A	N/A	N/A
Other current assets	N/A	N/A	N/A
Net fixed assets	N/A	N/A	N/A
Other long-term assets	N/A	N/A	N/A
<b>Total Assets</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<u>Liabilities</u>			
Current liabilities	N/A	N/A	N/A
Long-term debt	N/A	N/A	N/A
Other long-term liabilities	N/A	N/A	N/A
<b>Total Liabilities</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<u>Net Assets</u>			
Unrestricted	N/A	N/A	N/A
Temporarily restricted	N/A	N/A	N/A
Permanently restricted	N/A	N/A	N/A
<b>Total Liabilities and Net Assets</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

**Statement of Activities**

	N/A 2006	Derivative 2007	Derivative 2008		
<u>Support &amp; Revenue</u>					
Individual contributions	N/A	\$0	0%	\$350	0%
Bequests	N/A	0	0%	0	0%
Dues	N/A	0	0%	0	0%
In-kind contributions	N/A	0	0%	0	0%
Foundation contributions	N/A	300,000	100%	447,177	100%
Corporate contributions/Non-event sponsorships	N/A	0	0%	0	0%
Government funding	N/A	0	0%	0	0%
Program income	N/A	0	0%	0	0%
Fundraising event income	N/A	0	0%	0	0%
Less costs of direct benefit to donors	N/A	0	0%	0	0%
Net fundraising event income	N/A	\$0		\$0	
Merchandise sales (net of cost of goods sold)	N/A	0	0%	0	0%
Investment income	N/A	0	0%	0	0%
Other revenue	N/A	0	0%	334	0%
<b>Total Revenue</b>	<b>N/A</b>	<b>\$300,000</b>		<b>\$447,861</b>	
<u>Expenses</u>					
Program services	N/A	18,283	50%	300,745	92%
Fundraising	N/A	0	0%	0	0%
Management and general	N/A	18,000	50%	27,066	8%
Total cash expenses	N/A	\$36,283		\$327,811	
Non-cash expenses					
In-kind	N/A	0	0%	0	0%
Depreciation	N/A	0	0%	0	0%
Total non-cash expenses	N/A	\$0		\$0	
<b>Total Expenses</b>	<b>N/A</b>	<b>\$36,283</b>		<b>\$327,811</b>	
Capital campaign net revenue	N/A	0		0	
<b>Change in Net Assets</b>	<b>N/A</b>	<b>\$263,717</b>		<b>\$120,050</b>	

2009

**Council for Global Equality**  
**Standard Annual Report**

Page 5  
10/9/2009

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
5	40%	60%	0%	None	
African American/Black	Asian/Pacific Islander	Caucasian	Hispanic/Latino(a)	Native American	Other
0%	20%	60%	20%	0%	0%

Council for Global Equality  
1220 L Street, NW  
Suites 100-450  
Washington, DC 20005-4018  
202-719-0511  
www.globalequality.org

Additional Locations

**Senior Management Profile**

None

Legal Names

Council for Global Equality -  
Fiscal Sponsor - Public  
Interest Projects

Contact

Mark Bromley  
Chair of Council for Global Equality  
mark@globalequality.org

	Lowest	Average	Highest
Tenure with the organization	1.0	1.0	1.0
Compensation	\$90,000	\$100,000	\$105,000

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
4	2	2	75%	25%	0%
African American/Black	Asian/Pacific Islander	Caucasian	Hispanic/Latino(a)	Native American	Other
0%	0%	75%	25%	0%	0%

Note: Board and staff data as of 6/24/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- 1. Organization History** –The Council for Global Equality was launched in September 2008. Before that, the work was funded in 2007 as part of a year-long consultation process called the "LGBT Foreign Policy Project." Since 2007 was the first full year of operations, data for 2006 is reported as "N/A."
- 2. Fiscal Sponsor** – The Council for Global Equality conducts its work under a fiscal sponsorship arrangement with Public Interest Projects (PIP), a 501(c)(3) nonprofit. PIP does not prepare a separate Statement of Financial Position or a Statement of Cash Flow for its fiscal sponsored projects. Accordingly, these statements are not presenting in this report. And, as a result, the ratios of financial health that involve the Statement of Financial Position cannot be computed and are shown as "N/A" in this report.
- 3. Board and Governance** – The Board of Public Interest Projects provides fiduciary oversight to the work of the Council for Global Equality. The senior management team at Public Interest Projects also provides regular financial and management support to the Council. The Council's member organizations also contribute to governance by working with Council staff to set objectives and review advocacy progress through quarterly membership meetings.
- 4. Staff** – The Council's three staff are employees of Public Interest Projects. There is one additional adviser who is under contract to Public Interest Projects to provide senior-level leadership to the Council's work. His contributions and associated contract costs are included in the remuneration statistics but he is not an employee of the Council.
- 5. Funding** – The Council for Global Equality derives its funding from foundation-supported grants and donor-advised funds, rather than from individual contributions, and therefore there are no associated fundraising costs. Costs associated with the Council's management of its grants are reflected in the management fees paid to Public Interest Projects.



*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1990	New York
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$4,324,360	26
<i>Tax Status*</i>	
501(c)(3)	75%
501(c)(4)	25%

\* Percent of latest FY revenue.

**Mission**

Win equality and justice for LGBT New Yorkers and our families through education, organizing and advocacy programs. We work to create a broadly diverse alliance of LGBT people and allies in government, communities of faith, labor, the workforce and other social justice movements to achieve equality for LGBT New Yorkers and broader social, racial and economic justice.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

Note: The Pride Agenda is undergoing a 5-year strategic planning project in 2010 (delayed from 2009 due to fast-moving, high-opportunity events in NY legislature that required our full attention), at which time long-term goals and action plans will be enumerated. We anticipate that the new strategic plan will include these goals in some form:

1. Enact marriage equality legislation, Gender Expression Non-Discrimination Act (GENDA), and Dignity for All Students Act (Dignity).
2. Educate and organize in workplaces, congregations, unions and local communities to increase support across New York State for the LGBT community and our issues.
3. Enforce laws we have passed (SONDA) or will pass (GENDA, Dignity, Marriage) in workplaces, unions, schools and other state and local government entities.
4. Create and implement a diversity plan including recruitment and retention of staff and board members from under-represented communities and cultural competency training.

One-year Key Planned Accomplishments for FY2009

1. **Win marriage equality** in NY by passing NY Senate bill (Assembly bill has passed twice, 2nd time by 89 to 52 vote). Quantifiable efforts (among many discrete organizing, lobbying and media activities) include: identifying 1,000 supportive voters per target legislative district; recruiting and training 70 new Marriage Ambassadors for a total of 510 statewide; identifying 350 faith leaders who publicly support marriage equality for total of 800+; involving 75 rank-and-file union members, leaders and staff (whose unions support marriage equality) in local organizing, forums and contacts with media and elected officials; and mobilizing 2,000 to attend Equality & Justice Day.
2. **Pass GENDA** in NY Senate (Assembly bill has passed twice, 2nd time by 97 to 38 vote). Quantifiable efforts (among many activities) include: expand database of GENDA supporters to 1,500+ statewide; increase faith leader support to 500 clergy/lay leaders representing 25+ denominations; cause statewide Interfaith IMPACT group to include GENDA in their agenda; involve 30 rank-and-file union members, leaders and staff (whose unions support GENDA) in local organizing, forums and contacts with media and elected officials; and cause 2 new major NY employers to enact policies barring discrimination based on gender identity (GI) and gender expression (GE).
3. **Grow Pride in Action programs** that enlist allies in communities of faith, businesses and workplaces, and unions, as follows:
  - Increase industrial diversity of *Pride in My Workplace* by adding employers in 2 new industries. Publish and distribute new edition of Best Practices Guide, adding to it treatment of out-of-state civil unions and marriages and trans-supportive policies. Increase # of law firms and other employers with GI/GE non-discrimination policies.
  - Organize local *Pride in the Pulpit* committees for members in targeted communities. Deepen participation by communities of color (especially African American and Latino congregations) in local Pulpit Committees and in NYC people of color (POC) multi-faith organizing committee. Recruit congregational co-sponsors for Equality & Justice Day and increase participation in it by people of faith.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

- Publish *Pride in Our Union Labor Movement Handbook*. Add statewide public sector union as member. Increase union, low-income and POC attendance at Equality & Justice Day through union-sponsored buses. Organize LGBT community support for union organizing/contract or issue campaigns.
- 4. **Develop public policy and education infrastructure** and publish policy papers on marriage equality and transgender issues, including: multimedia tool to dispel common myths about seemingly negative effects of marriage equality; report on how religious institutions and freedoms were unharmed by enactment of marriage equality in MA; poll of attitudes toward marriage equality in 13 key Senate Districts; memo on how state agencies are implementing Governor's order to recognize legal out-of-state same-sex marriages; case study collection on NY employers' successful handling of transgender issues; and nation's 1st statewide assessment of LGBT health and human services.
- 5. Secure record level of state funding **LGBT Health & Human Services (HSS) Network**, including first-ever funding from state senate. Organize 1st statewide technical assistance conference for LGBT service providers. Strengthen service providers' capacity via workshops on data tracking, program evaluation and grant writing. Help sister statewide advocacy organizations create their own networks and secure public funding for LGBT HHS.
- 6. Increase participation by **NY State Dignity for All Students Coalition in Equality & Justice Day** and in letter-writing campaign in support of Dignity.

Key Accomplishments in FY2008

1. **Marriage equality:** Increased # of co-sponsoring/publicly supportive Senators; on Presidential Primary Day alone, identified 500 to 2,000 supportive voters per target key legislative district; recruited 70 new Marriage Ambassadors for total of 440 statewide; identified 335 publicly-supportive faith leaders; increased union support of marriage from unions representing total of 1.1 million to 2.3 million members and mobilized 1,300+ constituents to attend Equality & Justice Day.
2. **GENDA:** Used 1st-ever NY statewide poll on GENDA to persuade Assembly members that overwhelming majority of New Yorkers (78%) support it; expanded database of GENDA supporters to 1,000+ statewide; held 2 statewide GENDA Strategy Meetings and GENDA Community Ambassador trainings in 3 cities; increased faith leader support to 225 clergy/lay leaders from 25+ denominations; got clergy members to give 6 (of 10 recommended) sermons about trans equality; increased official union support from unions representing 414,000 members to 2.1 million members; and got 1 new major NY employer to enact policy barring discrimination based on GI/GE.
3. **Pride in My Workplace:** Launched 1 new Industry Roundtable (Pharmaceutical) and prepared to publish new edition Best Practices Guide in 2009.
4. **Pride in the Pulpit:** Created statewide Pulpit Coordinating Committee and new POC multi-faith organizing committee. Increased attendance by people of faith at Equality & Justice Day.
5. **Pride in Our Union:** Launched effort to get statewide public sector union as member; increased union, low-income and POC attendance at Equality & Justice Day through union-sponsored buses; and organized LGBT community support for 4 union organizing/contract campaigns.
6. **Public Policy and Education:** Worked with governor's office to issue formal directive to state agencies to respect same-sex marriages legal in state where performed, and developed online resources explaining new policy (with allies). Published demographic data on same-sex couples in NYC's 5 boroughs. Conducted 1st-ever statewide poll on transgender issues. Created and distributed brochure on trans issues. Met about GENDA with editorial boards of *Buffalo News*, *Rochester Democrat & Chronicle* and *Albany Times Union*. Worked with NY Office of Children & Family Services to issue policy and guidelines on culturally-competent treatment of LGBT youth in juvenile justice facilities.
7. **LGBT HHS Network:** Helped members maintain or increase funding after large 2006 increase. Added members serving POC and trans communities.
8. **NY State Dignity for All Students Coalition:** Documented existing network of youth organizing and advocates. Increased presence of coalition members and students at Equality & Justice Day.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

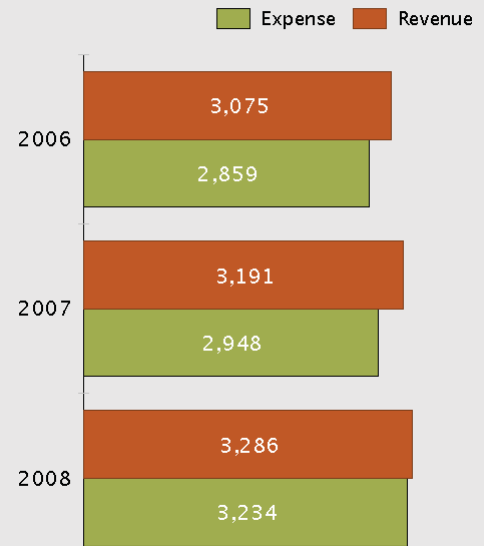
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	8.2	4.5	6.3
Days of working capital	94	117	116
Working capital (\$000)	\$721	\$932	\$1,007
Average daily cash expense (\$000)	\$7.7	\$8.0	\$8.7
Fundraising expense (cash only) to raise \$1	\$0.15	\$0.14	\$0.12
Total revenue raised through development efforts (\$000)	\$3,037	\$3,130	\$3,241

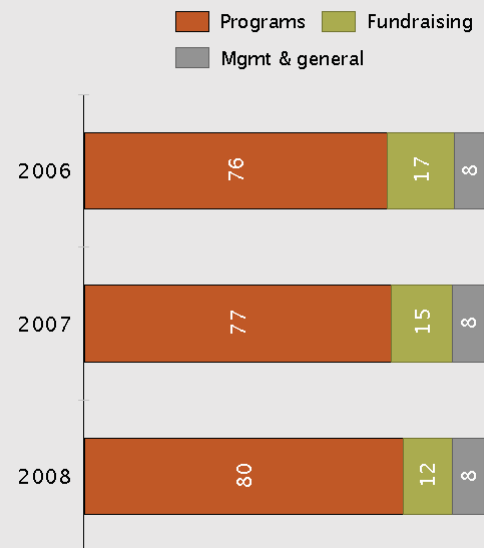
Indicators of Contributor Base

Number of individual donors who gave > \$35	1,696	1,754	2,019
Number of individual donors who gave > \$1,000	80	94	83
Donor turnover (gave > \$35 in prior FY & not this FY)	38%	17%	17%
Number of individuals attending fundraising events (paid > \$100 per person)	2,202	2,340	3,510
Percent of total revenue from top 10 contributors	43%	38%	40%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 61,582	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$548,321	\$598,849	\$939,480
Net cash provided (used) by operating activities	129,785	344,556	-88,387
Net cash provided (used) by investing activities	-79,257	-3,925	-6,988
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$50,528	\$340,631	-\$95,375
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$598,849</u>	<u>\$939,480</u>	<u>\$844,105</u>

**2009**

**Empire State Pride Agenda  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$598,849		\$939,480		\$844,105
Investments	0		0		0
Other current assets	195,576		198,929		296,140
Net fixed assets	117,781		103,381		79,565
Other long-term assets	37,146		37,146		37,146
<b>Total Assets</b>	<b>\$949,352</b>		<b>\$1,278,936</b>		<b>\$1,256,956</b>
<b>Liabilities</b>					
Current liabilities	\$73,434		\$206,867		\$132,966
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$73,434</b>		<b>\$206,867</b>		<b>\$132,966</b>
<b>Net Assets</b>					
Unrestricted	875,918		1,072,069		1,123,990
Temporarily restricted	0		0		0
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$949,352</b>		<b>\$1,278,936</b>		<b>\$1,256,956</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$1,094,509	36%	\$1,037,791	33%	\$947,688	29%
Bequests	0	0%	70,000	2%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	40,560	1%	19,220	1%	20,930	1%
Foundation contributions	362,566	12%	522,000	16%	537,000	16%
Corporate contributions/Non-event sponsorships	3,112	0%	33,000	1%	39,000	1%
Government funding	301,291	10%	257,842	8%	451,737	14%
Program income	0	0%	35,509	1%	34,353	1%
Fundraising event income	1,727,242	56%	1,660,378	52%	1,705,204	52%
Less costs of direct benefit to donors	-492,379	-16%	-470,727	-15%	-460,280	-14%
Net fundraising event income	\$1,234,863		\$1,189,651		\$1,244,924	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	24,075	1%	8,811	0%
Other revenue	38,419	1%	1,761	0%	1,272	0%
<b>Total Revenue</b>	<b>\$3,075,320</b>		<b>\$3,190,849</b>		<b>\$3,285,715</b>	
<b>Expenses</b>						
Program services	2,152,118	75%	2,242,380	76%	2,547,188	79%
Fundraising	441,801	15%	425,180	14%	377,844	12%
Management and general	214,239	7%	241,184	8%	257,027	8%
Total cash expenses	\$2,808,158		\$2,908,744		\$3,182,059	
Non-cash expenses						
In-kind	40,560	1%	19,220	1%	20,930	1%
Depreciation	10,052	0%	19,891	1%	30,804	1%
Total non-cash expenses	\$50,612		\$39,111		\$51,734	
<b>Total Expenses</b>	<b>\$2,858,770</b>		<b>\$2,947,855</b>		<b>\$3,233,793</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$216,550</b>		<b>\$242,994</b>		<b>\$51,922</b>	

**2009**

**Empire State Pride Agenda  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
24	67%	33%	8%	None, but all board members give contributions.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
17%	4%	71%	8%	0%	0%

Empire State Pride Agenda  
16 W. 22nd St., 2nd Floor  
New York, NY 10010  
212-627-0305  
www.prideagenda.org

Additional Locations

Albany  
Rochester

**Senior Management Profile**

Legal Names

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	2.8	5.0	8.0
Compensation	\$88,763	\$114,952	\$210,000

Empire State Pride Agenda, Inc. - 501(c)(4)

Empire State Pride Agenda Foundation, Inc. - 501(c)(3)

Contact

Alan Van Capelle  
Executive Director  
avancapelle@prideagenda.org

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
26	26	0	50%	46%	8%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
12%	4%	80%	4%	0%	0%

*Note: Board and staff data as of 5/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Financial Indicators** - The indicators on page 5 reflect the consolidated numbers for both the 501(c)(4) and 501(c)(3) entities that make up the Empire State Pride Agenda. The Foundation's 501(c)(3) stand-alone figures reflect a significantly higher % of dollars used for program services than the 501(c)(4). When combined, the % of dollars spent on program services decreases due to the large event expenses that the 501(c)(4) incurs. As an indication of the good use of funds for programs, the Empire State Pride Agenda Foundation was given a four-star rating by Charity Navigator, their highest rating.
- Individual Donors** - The number of individual donors who gave \$35 in FY2008 increased by 15% over 2007, which is slightly less than forecasted, but still a very strong increase in what became a tough economic environment. A testament to our supporters recognizing the important work we are doing is not only the overall increase in donors but also that the turnover ratio remained relative to 2007 in a year in which charitable giving nationwide declined.



**2009**

**Equality California  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1998	California
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$4,090,356	45
<i>Tax Status*</i>	
501(c)(3)	37%
501(c)(4)	63%
527 PAC	0%

*\* Percent of latest FY revenue.*

**Mission**

Achieve equality and acceptance for LGBT Californians.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Enact legislation necessary to achieve legal equality for LGBT Californians, protect LGBT Californians from discrimination based on sexual orientation and gender identity and ensure the health and well-being of LGBT Californians.
2. Prevent legislation harmful/damaging to LGBT Californians from being enacted.
3. Challenge laws that discriminate against, and defend attacks on laws that provide equal treatment of and/or protect, LGBT Californians in court as a party or amici.
4. Ensure statewide ballot measure committee is prepared to activate and respond as needed.
5. Effectively operate PAC and slate mailer committee.
6. Identify one million supporters of LGBT equality including marriage equality and non-discrimination protections for LGBT Californians and their families under state law.
7. Sign up 20% of identified LGBT voters as permanent vote-by-mail voters.
8. Obtain government funding for LGBT health and social service organizations; operating statewide LGBT health and social service network.
9. Obtain majority support for LGBT equality among Californians.
10. Conduct Equality Alliance meetings regularly with LGBT and non-LGBT organizations.

One-year Key Planned Accomplishments for FY2009

1. Enact a minimum of 3 pieces of EQCA-sponsored legislation in 2008. (c4)
2. Defeat any proposed legislation harmful/damaging to LGBT Californians. (c4)
3. Participate as an active and effective client, per our counsel, in cases to which we are a party and/or amici. (c4)
4. Actively participate in a leadership role in any campaign designed to pass any pro-LGBT ballot measure. (c4 and Issues PAC)
5. Conduct endorsement process and communicate to our members by mail, phone banks, media and emails in any special election in which we the PAC endorses a candidate. (c4 and Candidate PAC)
6. Increase # of identified supporters of marriage equality by a minimum of 10,000 individuals. (c3 and c4)
7. Send 2 emails and 2 press releases to ensure permanent vote by mail goal.
8. Conduct at least quarterly calls of Network; have one face-to-face meeting with Network coalition members; advocate against budget cuts and seek additional funds within the constraints of the current budget crisis. (c3 and c4)
9. Continue marriage education campaign; add 5 new organizations to Let California Ring; launch lawn sign and house party campaign. (c3)
10. Convene 6 or more Equality Alliance calls; convene Equality Summit. (c3)

*Key planned accomplishments continued in Notes and Advisory section.*

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2008

1. Passed 5 pieces of EQCA-sponsored legislation through both houses of the legislature in 2008; have secured authors for our first three 3 pieces of 2009 legislation.
2. Defeated all proposed legislation harmful/damaging to LGBT Californians.
3. Participated as an active and effective client in the CA Supreme Court marriage litigation that secured marriage equality, made sexual orientation a suspect class and held that LGB people are entitled to the highest level of judicial scrutiny. In addition, participated in litigation to preserve EQCA's safe schools legislation and challenges to Prop 8 both pre-election and post-election.
4. We actively participated with Geoff's service on the executive committee of the No on 8 – Equality for All campaign as the lead fundraiser. EQCA was the largest donor to the campaign (\$12.1 MM) and raised several million additional dollars directly to the campaign. EQCA staff served in key communications, field, development and other roles as requested by the campaign.
5. We conducted our endorsement process for all 2008 statewide races and contacted our members through media and email in more than a dozen races, by mail in more 4 races and conducted robo-calls and participated in field efforts in one key race.
6. We increased the # of identified supporters of marriage equality in our database by 300,000.
7. We sent 2 emails and 2 press releases relating to permanent absentee voting.
8. We conducted 9 calls of the Network and assisted 4 organizations in obtaining state funding. We also successfully advocated for and obtained additional funds in the state budget for LGBT health and human services totaling \$440,000.
9. Conducted successful market test of television ad and entire LCR campaign in Santa Barbara using Monterey as a control market. TV ad was then shown in all markets in CA except San Francisco, with a total ad buy of just over \$7 million.  
 Let California Ring also hosted the "Speaking Tour with Christine Chavez," granddaughter of United Farm Workers co-founder Cesar Chavez, at which Ms. Chavez spoke at 18 town halls – over 10,000 Latinos in Southern CA attended.  
 Let California Ring also placed an opinion piece written by Helen Chavez, widow of Cesar Chavez and grandmother of Christine Chavez. As of October 2008, The Gutierrez Group, a Spanish-language public relations firm based in San Antonio, estimated that the Helen Chavez op-ed reached 7.6 million media impressions in largely Spanish-language print coverage. There were an additional 85 Spanish-language websites that published the op-ed nationwide with a total of 20.6 million media impressions.
10. Convened more than 6 Equality Alliance calls.
11. MAP no longer provides this comparative information. However, board racial diversity is 29% people of color, gender diversity is 37% women and 4% transgender and regional diversity on boards was increased by a minimum of 2 regions (Central Coast and Central Valley) with 10 or more regions now being represented. Staff racial diversity is 29% people of color; gender diversity is 49% women and 7% transgender.

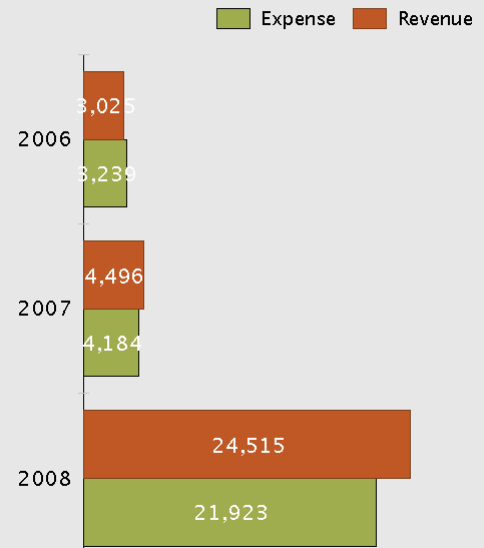
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

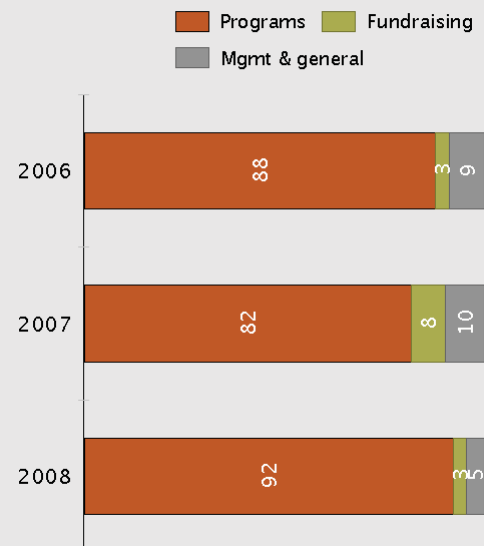
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	1.8	3.5	10.3
Days of working capital	56	68	56
Working capital (\$000)	\$447	\$649	\$3,223
Average daily cash expense (\$000)	\$8.0	\$9.5	\$57.4
Fundraising expense (cash only) to raise \$1	\$0.04	\$0.08	\$0.03
Total revenue raised through development efforts (\$000)	\$2,870	\$4,470	\$24,475
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	2,282	2,716	53,071
Number of individual donors who gave > \$1,000	218	199	1,719
Donor turnover (gave > \$35 in prior FY & not this FY)	37%	79%	54%
Number of individuals attending fundraising events (paid > \$100 per person)	1,656	2,098	3,000
Percent of total revenue from top 10 contributors	61%	37%	33%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 546,904	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$689,744	\$635,922	\$555,650
Net cash provided (used) by operating activities	-21,995	-66,630	2,489,844
Net cash provided (used) by investing activities	-31,827	-13,642	-6,257
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	-\$53,822	-\$80,272	\$2,483,587
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$635,922</u>	<u>\$555,650</u>	<u>\$3,039,237</u>

**2009**

**Equality California  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$635,922		\$555,650		\$3,039,237
Investments	0		0		0
Other current assets	161,574		251,022		479,193
Net fixed assets	45,603		45,302		58,371
Other long-term assets	24,984		134,534		140,457
<b>Total Assets</b>	<b>\$868,083</b>		<b>\$986,508</b>		<b>\$3,717,258</b>
<b>Liabilities</b>					
Current liabilities	\$350,833		\$157,238		\$295,908
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$350,833</b>		<b>\$157,238</b>		<b>\$295,908</b>
<b>Net Assets</b>					
Unrestricted	237,250		423,830		974,371
Temporarily restricted	280,000		405,440		2,446,979
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$868,083</b>		<b>\$986,508</b>		<b>\$3,717,258</b>

**Statement of Activities**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$673,525	22%	\$1,098,501	24%	\$13,282,140	54%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	312,360	10%	701,205	16%	961,565	4%
Foundation contributions	1,507,500	50%	1,627,000	36%	8,471,835	35%
Corporate contributions/Non-event sponsorships	8,553	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	45,000	1%	0	0%	0	0%
Fundraising event income	836,252	28%	1,366,114	30%	2,041,391	8%
Less costs of direct benefit to donors	-377,015	-12%	-316,200	-7%	-281,905	-1%
Net fundraising event income	\$459,237		\$1,049,914		\$1,759,486	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	18,501	1%	19,572	0%	40,376	0%
<b>Total Revenue</b>	<b>\$3,024,676</b>		<b>\$4,496,192</b>		<b>\$24,515,402</b>	
<b>Expenses</b>						
Program services	2,624,588	81%	2,822,836	67%	19,366,504	88%
Fundraising	107,224	3%	349,181	8%	694,630	3%
Management and general	187,211	6%	297,007	7%	904,609	4%
Total cash expenses	\$2,919,023		\$3,469,024		\$20,965,743	
Non-cash expenses						
In-kind	312,360	10%	701,205	17%	947,600	4%
Depreciation	7,784	0%	13,943	0%	9,982	0%
Total non-cash expenses	\$320,144		\$715,148		\$957,582	
<b>Total Expenses</b>	<b>\$3,239,167</b>		<b>\$4,184,172</b>		<b>\$21,923,325</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$214,491</b>		<b>\$312,020</b>		<b>\$2,592,077</b>	

**2009**

**Equality California  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
49	61%	39%	4%	Must give or raise \$10,000 per year with assistance from the Development staff.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
8%	4%	71%	14%	2%	0%

Equality California  
2370 Market St., 2nd Floor  
San Francisco, CA 94114  
415-581-0005  
www.eqca.org

Additional Locations

Fresno  
Los Angeles (x2)  
Riverside  
Palm Springs  
Sacramento (x2)  
San Diego  
San Jose

Legal Names

Equality California Institute - 501(c)(3)  
Equality California - 501(c)(4)  
Equality California Issues PAC - 501(c)(4)  
Equality California Political Action Committee - 527 PAC

Contact

Steve Mele  
Director of Finance  
Steve@eqca.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	3.0	4.2	7.0
Compensation	\$60,000	\$110,000	\$200,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
45	44	1	51%	49%	7%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
4%	7%	76%	16%	0%	2%

*Note: Board and staff data as of 9/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

One-year Key Planned Accomplishments for FY2009 (continued)

- Recruit board and staff representing the diversity of CA and a minimum of 6 regions of CA represented on the board of directors. (c4 and c3)

For additional information please contact Equality California or visit our websites at [www.eqca.org](http://www.eqca.org), [www.eqcai.org](http://www.eqcai.org), [www.eqcapac.org](http://www.eqcapac.org) and [www.letcaliforniaring.org](http://www.letcaliforniaring.org)



**2009**

**Equality Federation**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1997	All States & Territories
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Capacity-building/Research
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$790,032	5
<i>Tax Status*</i>	
501(c)(3)	70%
501(c)(4)	30%

\* Percent of latest FY revenue.

**Mission**

Achieve equality for LGBT people in every state and territory by building strong and sustainable statewide organizations in a state-based movement.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Support the creation of statewide LGBT advocacy organizations in 10 states that do not currently have such groups.
2. Stabilize 15 existing Equality Federation organizations to sustain baseline operations, including incorporation (501(c)(3), PAC, etc.), trained leadership, and implementation of development plans.
3. Produce a state-centered strategic agenda for the US by end 2009 based on development of 25 state-based advocacy plans that will define goals and set timelines for the movement.
4. Assist 30+ existing state equality organizations to develop advocacy program plans, facilitate increases in funding and staffing, and develop and manage voter, activist, and donor lists.
5. Provide leadership training and technical support to 120 state leaders (staff and board) each year.

One-year Key Planned Accomplishments for FY2009

1. Research and issue report on *The Equality Agenda*, a guide to state policy goals intended to support strategic collaboration for movement organizations and funders.
2. Research and publish *2009 State of the States Report*, with MAP.
3. Support organizational growth for 25+ state organizations through board training, advocacy planning support, executive coaching, development support, and fiscal sponsorship.
4. Provide services for all member groups including online technologies, job posting service, peer materials library, resource directory.
5. Provide leadership development opportunities for 120+ state leaders through annual Summer Meeting.
6. Recruit, sponsor, and train 10 diverse interns to work in state organizations in 2009.
7. Develop plan for transitioning state groups from existing to new technology service while adding database solution.

Key Accomplishments in FY2008

1. Provided 43 organizations in 38 states with online advocacy & fundraising software to reach over 1 million equality supporters.
2. Researched and developed plan to expand shared technology infrastructure (managed by Equality Federation on behalf of all member groups) to enhance tracking and facilitation of members' relationships with donors, volunteers, supporters, and voters. (Implementation timeline has been extended due to technology issues and a funding slowdown.)
3. Helped 12 state organizations complete advocacy plans.
4. Provided skills development training opportunities for 120 state leaders through Summer Meeting, onsite customized trainings, and virtual workshops.

**2009**

**Equality Federation**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

5. Launched internship program and placed 8 students in state organizations; 50% were students of color and 50% identified as transgender or genderqueer.
6. Provided customized organizational support, crisis support, executive coaching, fiscal sponsorship, development support, and related services and resources for 25+ organizations.
7. Hosted 11th Annual Summer Meeting of state organizations and allies, providing 21 training workshops, strategy meetings, and networking opportunities for 130 movement leaders from the states.
8. Provided communication and resource sharing tools for hundreds of leaders at 55 state organizations in 45 states.
9. Produced and distributed (in partnership with MAP) the 2008 State of the States Report, assessing organizational capacity of 47 state organizations.
10. Provided inexpensive but sophisticated online fundraising technology to CA's No On Prop 8 campaign; also provided staff support to implement national phone banking program.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

For the fiscal year ending December 31

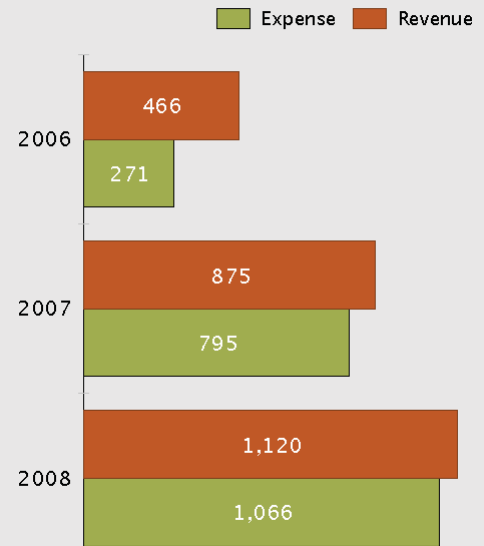
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	2.2	2.1	1.6
Days of working capital	237	133	124
Working capital (\$000)	\$175	\$288	\$347
Average daily cash expense (\$000)	\$0.7	\$2.2	\$2.8
Fundraising expense (cash only) to raise \$1	\$0.05	\$0.09	\$0.04
Total revenue raised through development efforts (\$000)	\$466	\$675	\$1,118

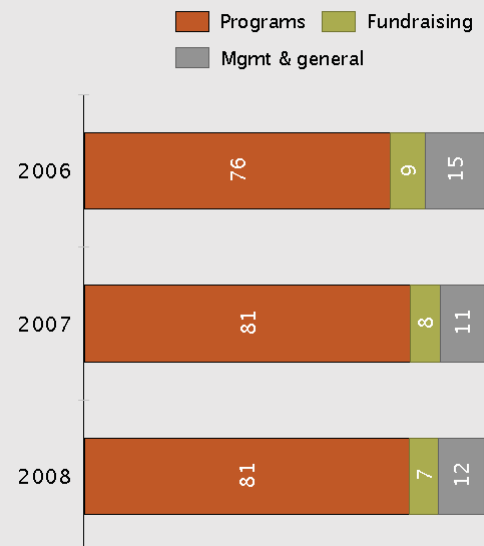
Indicators of Contributor Base

Number of individual donors who gave > \$35	63	66	196
Number of individual donors who gave > \$1,000	8	18	22
Donor turnover (gave > \$35 in prior FY & not this FY)	16%	11%	26%
Number of individuals attending fundraising events (paid > \$100 per person)	0	0	0
Percent of total revenue from top 10 contributors	68%	86%	51%
Number of unique contactable names currently in fundraising and e-action databases	<u>Current</u> 1,161,410		

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Unaudited</u> 2006	<u>Unaudited</u> 2007	<u>Unaudited</u> 2008
Cash and cash equivalent balance at beginning of year	\$2,562	\$44,119	\$154,037
Net cash provided (used) by operating activities	49,210	126,766	61,659
Net cash provided (used) by investing activities	-7,653	-16,848	0
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>\$41,557</u>	<u>\$109,918</u>	<u>\$61,659</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$44,119</u>	<u>\$154,037</u>	<u>\$215,696</u>

**2009**

**Equality Federation  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Unaudited</i> 2006	<i>Unaudited</i> 2007	<i>Unaudited</i> 2008
<i>Assets</i>			
Cash and cash equivalents	\$44,119	\$154,037	\$215,696
Investments	0	0	0
Other current assets	151,043	207,882	265,826
Net fixed assets	824	17,663	13,527
Other long-term assets	7,653	7,662	7,718
<b>Total Assets</b>	<b>\$203,639</b>	<b>\$387,244</b>	<b>\$502,767</b>
<i>Liabilities</i>			
Current liabilities	\$19,847	\$73,634	\$134,874
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$19,847</b>	<b>\$73,634</b>	<b>\$134,874</b>
<i>Net Assets</i>			
Unrestricted	33,792	113,610	151,281
Temporarily restricted	150,000	200,000	216,612
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$203,639</b>	<b>\$387,244</b>	<b>\$502,767</b>

**Statement of Activities**

	<i>Unaudited</i> 2006		<i>Unaudited</i> 2007		<i>Unaudited</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$18,454	4%	\$90,083	10%	\$62,167	6%
Bequests	0	0%	0	0%	0	0%
Dues	73,729	16%	57,373	7%	78,015	7%
In-kind contributions	2,000	0%	0	0%	37,906	3%
Foundation contributions	322,125	69%	490,500	56%	536,126	48%
Corporate contributions/Non-event sponsorships	0	0%	4,086	0%	1,221	0%
Government funding	0	0%	0	0%	0	0%
Program income	49,367	11%	228,272	26%	401,178	36%
Fundraising event income	125	0%	4,200	0%	905	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$125		\$4,200		\$905	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	57	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	45	0%	735	0%	2,690	0%
<b>Total Revenue</b>	<b>\$465,845</b>		<b>\$875,249</b>		<b>\$1,120,265</b>	
<i>Expenses</i>						
Program services	206,863	76%	646,335	81%	864,930	81%
Fundraising	24,075	9%	60,320	8%	49,258	5%
Management and general	39,608	15%	86,317	11%	107,752	10%
Total cash expenses	\$270,546		\$792,972		\$1,021,940	
Non-cash expenses						
In-kind	0	0%	0	0%	39,906	4%
Depreciation	558	0%	2,459	0%	4,136	0%
Total non-cash expenses	\$558		\$2,459		\$44,042	
<b>Total Expenses</b>	<b>\$271,104</b>		<b>\$795,431</b>		<b>\$1,065,982</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$194,741</b>		<b>\$79,818</b>		<b>\$54,283</b>	

2009

## Equality Federation Standard Annual Report

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Board Members

### Locations & Contact

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>
14	57%	43%	7%	Must contribute personally and by raising funds to meet collective board goal (about 3-7% of total budget).
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>
0%	0%	100%	0%	0%
				<i>Other</i>
				0%

Equality Federation  
2069A Mission St.  
San Francisco, CA 94110  
415-252-0510  
www.equalityfederation.org

Additional Locations

None

Legal Names

### Senior Management Profile

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	2.5	3.5	4.5
Compensation	\$65,000	\$78,450	\$93,600

Equality Federation - 501(c)(4)  
Equality Federation Institute - 501(c)(3)

Contact

### Paid Staff

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
5	5	0	20%	80%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
20%	20%	60%	0%	0%	0%

Toni Broaddus  
Executive Director  
toni@equalityfederation.org

*Note: Board and staff data as of 10/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

### Organization's Notes and Advisories

1. **Background** - Equality Federation is a collaborative organization created by leaders of state LGBT advocacy organizations to build the capacity of statewide organizations, increase resources directed to states, and develop a state-based strategy for equality. As a coalition, the Federation has been in existence since 1997; its current structure as an independent, incorporated collaborative entity began in 2005. For more information, visit our website at [www.equalityfederation.org](http://www.equalityfederation.org).
2. **List Size** - Our list size reflects the total number of contacts accessible through Equality Federation's online advocacy and fundraising databases, which include the Federation's list along with the lists of 42 member organizations who participate in the Federation's technology service program.
3. **Staff & Board Demographics** - At the end of 2008, Equality Federation had 7 employees; staff size was reduced to 6 employees in 2009. At the time of publication (late summer 2009), two staff positions were open but in the process of being filled. Board members were also being recruited at the time of publication, specifically in an effort to add people of color to both Boards.



**2009**

**Equality Forum  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1992	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Arts/media
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$909,000	5
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Educate national and international audiences on GLBT civil rights organization. Equality Forum coordinates GLBT History Month, produces documentary films, undertakes high impact initiatives, and presents the largest annual international GLBT civil rights forum.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Expand GLBT History Month into a national recognized resource.
2. Enhance the quality and reach of the annual Equality Forum symposium.
3. Undertake innovative initiatives and studies with strategic impact.
4. Increase to the largest GLBT Collaboration, the organizations linking to GLBT History Month.

One-year Key Planned Accomplishments for FY2010

1. Increase by 1500% the organizations and educational institutions that link to GLBT History Month.
2. Significantly increase gay and mainstream regional, national and international media coverage of Equality Forum 2010.
3. Complete and share strategic studies.

Key Accomplishments in FY2009

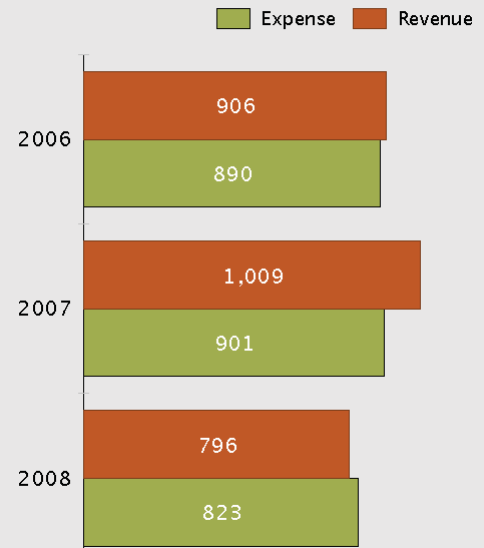
1. Expanded GLBT History Month in its 3rd year with Web-based educational and downloadable resources for 31 GLBT Icons.
2. Enhanced programming in collaboration with 60 regional, national and international organizations at Equality Forum 2008, with Gays and Lesbians in the Muslim World as the international focus.
3. Completed and shared strategic studies.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

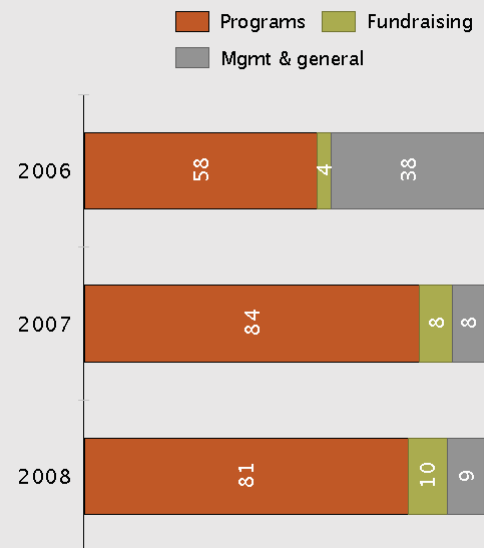
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.1	7.5	7.1
Days of working capital	-49	66	63
Working capital (\$000)	-\$118	\$163	\$142
Average daily cash expense (\$000)	\$2.4	\$2.5	\$2.2
Fundraising expense (cash only) to raise \$1	\$0.05	\$0.11	\$0.14
Total revenue raised through development efforts (\$000)	\$595	\$678	\$543
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	45	89	0
Number of individual donors who gave > \$1,000	22	30	0
Donor turnover (gave > \$35 in prior FY & not this FY)	49%	33%	13%
Number of individuals attending fundraising events (paid > \$100 per person)	404	548	510
Percent of total revenue from top 10 contributors	24%	27%	37%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 17,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$27,755	\$19,670	\$104,868
Net cash provided (used) by operating activities	2,288	140,740	128,321
Net cash provided (used) by investing activities	80,000	-45,542	-81,782
Net cash provided (used) by financing activities	<u>-90,373</u>	<u>-10,000</u>	<u>0</u>
Net increase (decrease) in cash	-\$8,085	\$85,198	\$46,539
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$19,670</u>	<u>\$104,868</u>	<u>\$151,407</u>

**2009**

**Equality Forum  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<i>Assets</i>					
Cash and cash equivalents	\$19,670		\$104,868		\$151,407
Investments	0		0		0
Other current assets	21,500		72,080		11,584
Net fixed assets	138,860		132,752		126,644
Other long-term assets	312,877		163,391		81,696
<b>Total Assets</b>	<b>\$492,907</b>		<b>\$473,091</b>		<b>\$371,331</b>
<i>Liabilities</i>					
Current liabilities	\$158,727		\$14,054		\$21,181
Long-term debt	0		130,000		130,000
Other long-term liabilities	230,112		116,780		35,000
<b>Total Liabilities</b>	<b>\$388,839</b>		<b>\$260,834</b>		<b>\$186,181</b>
<i>Net Assets</i>					
Unrestricted	104,068		104,757		147,150
Temporarily restricted	0		107,500		38,000
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$492,907</b>		<b>\$473,091</b>		<b>\$371,331</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$143,597	16%	\$260,925	26%	\$171,052	21%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	113,500	13%	63,800	6%	6,720	1%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	310,000	34%	336,000	33%	365,000	46%
Program income	295,961	33%	326,467	32%	252,208	32%
Fundraising event income	27,484	3%	17,490	2%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$27,484		\$17,490		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	15,424	2%	4,287	0%	1,061	0%
<b>Total Revenue</b>	<b>\$905,966</b>		<b>\$1,008,969</b>		<b>\$796,041</b>	
<i>Expenses</i>						
Program services	517,496	58%	751,740	83%	663,126	81%
Fundraising	31,483	4%	72,058	8%	78,577	10%
Management and general	334,918	38%	70,874	8%	75,338	9%
<b>Total cash expenses</b>	<b>\$883,897</b>		<b>\$894,672</b>		<b>\$817,041</b>	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	5,701	1%	6,108	1%	6,108	1%
<b>Total non-cash expenses</b>	<b>\$5,701</b>		<b>\$6,108</b>		<b>\$6,108</b>	
<b>Total Expenses</b>	<b>\$889,598</b>		<b>\$900,780</b>		<b>\$823,149</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$16,368</b>		<b>\$108,189</b>		<b>-\$27,108</b>	

**2009**

**Equality Forum  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>		Equality Forum 1420 Locust St., Suite 300 Philadelphia, PA 19102 215-732-3378 www.equalityforum.com
18	56%	44%	0%	\$250, give or get; college student board member is exempt.		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
17%	6%	71%	6%	0%	0%	<u>Additional Locations</u>  None
Senior Management Profile						<u>Legal Names</u>
			<i>Lowest</i>	<i>Average</i>	<i>Highest</i>	Equality Forum, Inc. - 501(c)(3)  <u>Contact</u>  Malcolm Lazin Executive Director mlazin@equalityforum.com
Tenure with the organization			0.6	4.1	17.0	
Compensation			\$32,000	\$68,500	\$155,500	
Paid Staff						
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	
5	5	0	100%	0%	0%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
0%	0%	100%	0%	0%	0%	
<p><i>Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>						

**Organization's Notes and Advisories**

Equality Forum undertakes multiple high-impact projects. While most are budgeted on the organization's fiscal year budget, each documentary film has its own budget and timeline which can span fiscal years. MAP's standardized financial statements are based on Equality Forum's financial statements as presented in its audit reports. The audited financial statements delineate documentary film costs and revenues into each fiscal year's audit report, which can skew the organization's overall financial history.

Starting in 2004, Equality Forum embarked on a documentary film project, Saint of 9/11. With a fixed deadline for completion by April 2006, Equality Forum borrowed funds to meet this goal. At the end of FY2006, Equality Forum entered into a 10-year licensing and royalty arrangement for the film. The agreement called for a minimum guarantee of \$125,000; \$50,000 paid immediately to Equality Forum and \$75,000 spent by the licensee on promotion and marketing. Thereafter, Equality Forum will earn royalties from broadcasting rights, DVD rentals and theatrical and video gross receipts. Equality Forum also retained the right to sell DVDs via its website.

In FY2007, Equality Forum reduced the Saint of 9/11 film liability from \$230,000 to \$117,000. Costs are amortized over the anticipated significant revenue stream, a period not expected to exceed 3 years.

In FY2008, Equality Forum further reduced the Saint of 9/11 film liability from \$117,000 to \$35,000.

**2009**

**Family Equality Council  
Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1979	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,600,000	11
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Ensure equality for LGBT families by building community, changing hearts and minds, and advancing social justice for all families.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Improve access to federal programs, projects and services for LGBT individuals by expanding the narrow definitions of "family" contained in at least two federal administrative regulations by 2012.
2. Pass safe schools legislation in MA in 2010 and in MN in 2011 and repeal the FL LGBT adoption ban by 2012.
3. Promote greater understanding of LGBT-headed families by documenting representative stories of their power and passion and the systemic change they create: 24 stories in 2009, 36 in 2010, 48 in 2011, and 60 in 2012. Build media/action campaigns to broadcast and leverage individual stories locally, state-wide and nationally: 3 media/action campaigns in 2009 and 2 per year thereafter.
4. Build and sustain healthy LGBT families throughout the continuum of their lives by: hosting 3 educational conferences in key regions of the US; building a robust online social networking site for LGBT parents, their children and families to connect and share best practices which will be accessed by more than 75,000 individuals; and providing programming for children of LGBT parents that affirms and supports their family structures and gives them strength to speak out when necessary.
5. Build and sustain our work with LGBT families of color by implementing solutions to needs identified in Project Harmony, which provides voice to families of color within and outside FEC. The program will actively raise issues relevant to our combined oppressions, leading us to challenge the LGBTQ movement's assumptions and actions; raise and promote an anti-oppression agenda with, for and by our 40,000+ constituent members, partners and programs; and promote racial equality/economic opportunities, including access to services, maintenance of cultural heritage in mixed race adoptions, and community among mixed-raced families.

One-year Key Planned Accomplishments for FY2009

1. Complete a review of the Department of Health and Human Services to identify and prioritize areas to reform the definition of family.
2. Hire Director of Finance & Administration to better manage infrastructure, systems and financial tools necessary to make sound decisions about programmatic investments.
3. Develop a working model for a regional volunteer advisory council in the Midwest to replicate in other regions of the country. Replicate best practices in peer to peer networking groups and social justice committee and community gatherings.
4. Secure passage of the MN safe schools bill through both branches of the MN Legislature. Build a successful model to replicate in other safe schools initiatives at the state level.
5. Increase participation in our youth programming by 10%.

Key Accomplishments in FY2008

1. Launched Public Policy Department to advance state and federal family equality agendas. Department provides state and local partners with technical assistance in legislative drafting and strategy; and works in coalition with other national organizations to advance key policy changes (e.g., safe schools, healthcare reform, paid sick leave) that benefit LGBT parents.

**2009**

**Family Equality Council**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

2. Finished Year 1 of Project Harmony. Included 7 listening dialogues, online survey of LGBT parents of color and drafting of preliminary findings report.
3. Launched youth programming for children aged 3 to 8, serving 700+ youth in 2008.
4. Conducted 3 national media and visibility campaigns, including successfully lobbying TiVo to end its partnership with Focus on the Family on a SuperDad contest.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

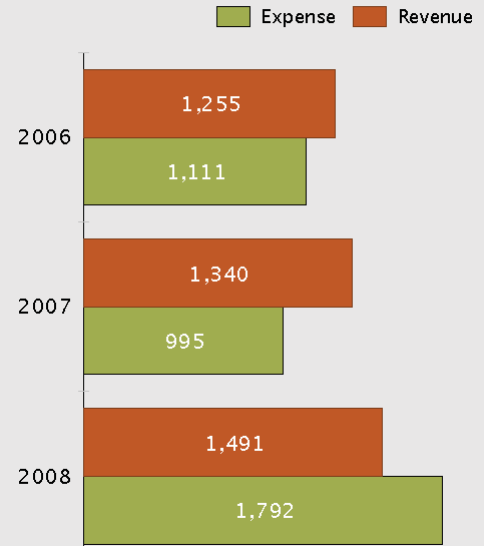
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	13.0	8.4	8.2
Days of working capital	101	227	77
Working capital (\$000)	\$288	\$615	\$357
Average daily cash expense (\$000)	\$2.8	\$2.7	\$4.6
Fundraising expense (cash only) to raise \$1	\$0.10	\$0.10	\$0.28
Total revenue raised through development efforts (\$000)	\$1,062	\$1,320	\$1,339

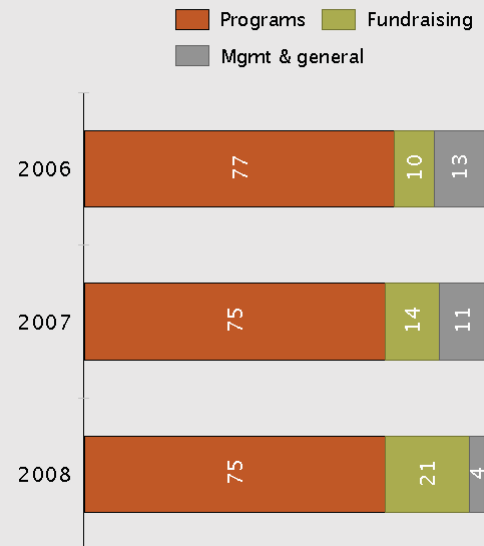
Indicators of Contributor Base

Number of individual donors who gave > \$35	1,490	1,107	604
Number of individual donors who gave > \$1,000	202	186	125
Donor turnover (gave > \$35 in prior FY & not this FY)	50%	61%	93%
Number of individuals attending fundraising events (paid > \$100 per person)	480	457	600
Percent of total revenue from top 10 contributors	36%	26%	34%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 32,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$99,418	\$154,873	\$370,256
Net cash provided (used) by operating activities	61,185	231,960	-110,851
Net cash provided (used) by investing activities	-5,730	-14,723	-5,782
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$55,455	\$217,237	-\$116,633
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$154,873</u>	<u>\$372,110</u>	<u>\$253,623</u>

**2009**

**Family Equality Council  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<i>Assets</i>					
Cash and cash equivalents	\$154,873		\$372,110		\$253,623
Investments	0		0		0
Other current assets	145,202		287,599		134,128
Net fixed assets	11,687		19,571		15,387
Other long-term assets	0		0		0
<b>Total Assets</b>	<b>\$311,762</b>		<b>\$679,280</b>		<b>\$403,138</b>
<i>Liabilities</i>					
Current liabilities	\$11,939		\$44,270		\$30,756
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
Total Liabilities	\$11,939		\$44,270		\$30,756
<i>Net Assets</i>					
Unrestricted	249,823		364,097		199,382
Temporarily restricted	50,000		270,913		173,000
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$311,762</b>		<b>\$679,280</b>		<b>\$403,138</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$479,165	38%	\$619,307	46%	\$827,011	55%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	68,500	5%	10,184	1%	101,880	7%
Foundation contributions	335,150	27%	451,813	34%	277,500	19%
Corporate contributions/Non-event sponsorships	121,750	10%	39,294	3%	91,629	6%
Government funding	0	0%	0	0%	0	0%
Program income	18,515	1%	0	0%	26,322	2%
Fundraising event income	307,271	24%	332,157	25%	252,026	17%
Less costs of direct benefit to donors	-81,920	-7%	-122,108	-9%	-109,101	-7%
Net fundraising event income	\$225,351		\$210,049		\$142,925	
Merchandise sales (net of cost of goods sold)	3,522	0%	2,680	0%	-42	-0%
Investment income	0	0%	0	0%	0	0%
Other revenue	3,135	0%	7,103	1%	24,045	2%
Total Revenue	<b>\$1,255,088</b>		<b>\$1,340,430</b>		<b>\$1,491,270</b>	
<i>Expenses</i>						
Program services	803,561	72%	743,821	74%	1,240,250	69%
Fundraising	110,569	10%	133,461	13%	373,629	21%
Management and general	124,244	11%	111,781	11%	68,050	4%
Total cash expenses	\$1,038,374		\$989,063		\$1,681,929	
Non-cash expenses						
In-kind	68,500	6%	10,184	1%	101,880	6%
Depreciation	4,460	0%	5,996	1%	8,605	0%
Total non-cash expenses	\$72,960		\$16,180		\$110,485	
Total Expenses	<b>\$1,111,334</b>		<b>\$1,005,243</b>		<b>\$1,792,414</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$143,754</b>		<b>\$335,187</b>		<b>-\$301,144</b>	

**2009**

**Family Equality Council  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
16	81%	19%	0%	Required to raise \$10,000 per year.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	100%	0%	0%	0%

Family Equality Council  
PO Box 206  
Boston, MA 02133  
617-502-8700  
www.familyequality.org

Additional Locations

Minneapolis MN  
Washington DC

Legal Names

Family Equality Council -  
501(c)(3)

Contact

Jennifer Chrisler  
Executive Director  
director@familyequality.org

**Senior Management Profile**

	<u>Lowest</u>	<u>Average</u>	<u>Highest</u>
Tenure with the organization	1.0	2.3	4.0
Compensation	\$90,000	\$106,484	\$124,451

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
11	11	0	82%	18%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	100%	0%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- New Strategic Plan** – In May of 2008, the Board of Directors officially activated a new strategic plan for the organization that was the culmination of a 9-month, stakeholder-driven, organizationally-funded planning process. The plan emphasize four key goals: building and sustaining the LGBT parenting community from across the continuum of their lives from pre-parenting to grand-parenting, leveraging the power and passion of LGBT parents in media, visibility and action campaigns to support institutional and legislative change, launching a Public Policy department that will lead an aggressive effort to advance policy for family equality and investing in the infrastructure of the organization to create sustainable growth for FEC.
- Fundraising Challenges** – Family Equality Council raises more than 50% of its income in the second half of its fiscal year. 2008 proved particularly challenging for fundraising because of the impact of the economic downturn in the fall of 2008 and the significant impact the California Proposition 8 campaign had on our ability to raise funds in the second half of the year. Despite these difficulties, we were able to achieve many of the goals and objectives we outlined for the year. As a result of the economic challenges, we planned for a downturn at the end of 2008 and executed layoffs in January of 2009. FEC felt this was a prudent step to maintain the overall financial stability of the organization while we weather this downturn.



**2009**

**Freedom to Marry  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2003	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,589,000	5
<i>Tax Status*</i>	
Fiscal Sponsor	100%
- Astraea Foundation	

\* Percent of latest FY revenue.

**Mission**

End discrimination in marriage nationwide by guiding and focusing this social justice movement and bringing gay and non-gay organizations' many approaches—including litigation, legislation, direct action, and public education—into a larger whole and a shared civil rights campaign that fosters heightened outreach to non-gay allies.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Achieve marriage equality for same-sex couples in 5 more states including CA.
2. Repeal significant portions of the so-called federal DOMA, legislatively or judicially.
3. Demonstrate ability to win freedom to marry at the ballot box.
4. Help secure incremental gains (e.g., civil union, domestic partnership) and articulate them as part of the advance to marriage equality.
5. Continue to frame the national dialogue and enlist new allies and voices.
6. Significantly scale up the marriage movement's infrastructure, activities, and funding.

One-year Key Planned Accomplishments for FY2010

1. Achieve freedom to marry in 2+ additional states.
2. Ensure key states are on track with their marriage strategy and are getting support.
3. Begin legislative battle to repeal so-called federal DOMA.
4. Work with funders and colleagues to take national marriage campaign to a higher level by increasing funding to the movement and adding new capacity for action and messaging to the movement through the "National Collaborative" or other mechanism called for in the "2020 Vision."

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

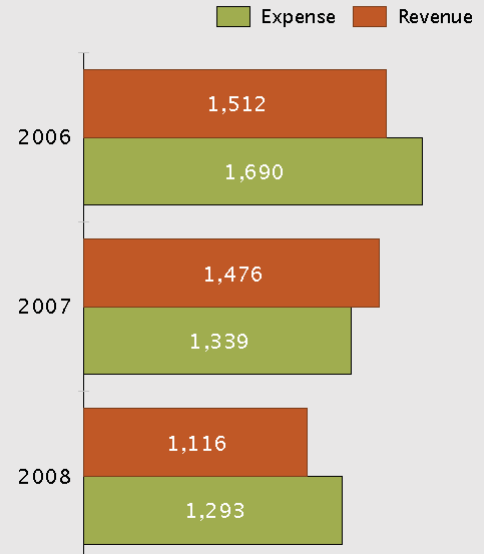
1. Achieved the freedom to marry in 5 more states (CT, IA, VT, ME, NH).
2. Achieved steps toward marriage in several more jurisdictions:
  - State legislatures considered record number of marriage bills (13) and passed them for the first time ever in 3 states
  - Couples stood before high courts of 2 states seeking to overturn state constitutional provisions that legalize discrimination in marriage (CA and WI)
  - Legislatures in 2 states (WA and NV) enacted measures just short of marriage
  - Legislatures in one other state (WI) enacted some provisions of domestic partnerships despite an anti-gay state constitutional amendment
3. Additional protections for gay couples were enacted in CO and MD. Public opinion continued to move toward embracing marriage equality, as new voices entered fray on our side.
  - President Obama reiterated his pledge to repeal so-called federal DOMA
  - 14 US Senators and 35 US Representatives openly support the freedom to marry
  - Numerous Republican and conservative voices now call for an end to discrimination in marriage
  - US Mayors Conference passed resolution calling for marriage equality nationwide
  - Hosts of prominent citizens now speak daily in support of freedom to marry as catalogued in our Voices For Equality
4. Convened bi-weekly meetings of coalition groups to ensure key states are on track with their marriage strategy and getting support. Provided expertise through face-to-face and phone consultations to over 20 state partner groups. Funded marriage work through re-granting and partner support equal to 25% of Freedom to Marry's budget.
5. ED Evan Wolfson served as advisor to Civil Marriage Collaborative (CMC) and on Executive Committee of National Collaborative. The CMC involves more than 20 funders and national LGBT organizations, working to strategically deploy new resources to efforts in a small # of states with high potential to advance marriage goals (among others) over next 3 years.
6. Began organizational and programmatic reconfiguring to best equip us to deliver on our goals by focusing on message and information delivery through enhanced Web presence; and by increasing online contacts from 5,000 to 25,000.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

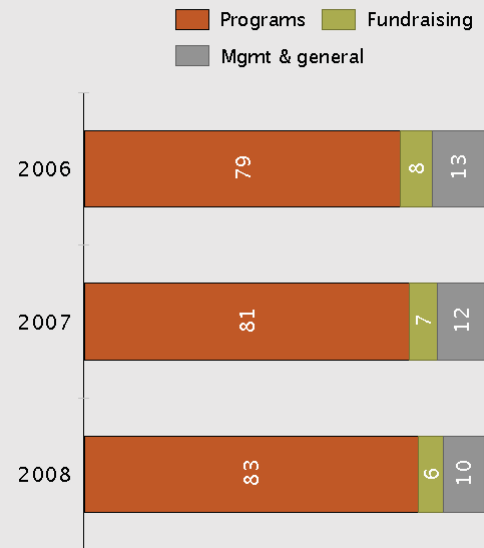
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	5.8	3.9	1.2
Days of working capital	166	202	157
Working capital (\$000)	\$770	\$740	\$554
Average daily cash expense (\$000)	\$4.6	\$3.7	\$3.5
Fundraising expense (cash only) to raise \$1	\$0.09	\$0.06	\$0.07
Total revenue raised through development efforts (\$000)	\$1,512	\$1,476	\$1,116
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	98	84	134
Number of individual donors who gave > \$1,000	8	13	8
Donor turnover (gave > \$35 in prior FY & not this FY)	18%	30%	50%
Number of individuals attending fundraising events (paid > \$100 per person)	0	136	0
Percent of total revenue from top 10 contributors	96%	93%	94%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 5,800	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>N/A</u> <u>2006</u>	<u>N/A</u> <u>2007</u>	<u>N/A</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	N/A	N/A	N/A
Net cash provided (used) by operating activities	N/A	N/A	N/A
Net cash provided (used) by investing activities	N/A	N/A	N/A
Net cash provided (used) by financing activities	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>
Net increase (decrease) in cash	N/A	N/A	N/A
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>

**2009**

**Freedom to Marry  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Derivative</i> <u>2006</u>	<i>Derivative</i> <u>2007</u>	<i>Derivative</i> <u>2008</u>
<i>Assets</i>			
Cash and cash equivalents	\$323,884	\$107,884	\$2,421
Investments	598,932	844,102	337,453
Other current assets	5,283	32,750	500,256
Net fixed assets	0	0	0
Other long-term assets	21,120	22,220	31,900
<b>Total Assets</b>	<b>\$949,219</b>	<b>\$1,006,956</b>	<b>\$872,030</b>
<i>Liabilities</i>			
Current liabilities	\$158,350	\$244,290	\$285,753
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$158,350</b>	<b>\$244,290</b>	<b>\$285,753</b>
<i>Net Assets</i>			
Unrestricted	670,769	762,666	586,277
Temporarily restricted	120,100	0	0
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$949,219</b>	<b>\$1,006,956</b>	<b>\$872,030</b>

**Statement of Activities**

	<i>Derivative</i> <u>2006</u>		<i>Derivative</i> <u>2007</u>		<i>Derivative</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$434,804	29%	\$403,364	27%	\$41,990	4%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	1,077,000	71%	1,072,750	73%	1,074,500	96%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	650	0%	0	0%	0	0%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	0	0%	0	0%	0	0%
<b>Total Revenue</b>	<b>\$1,512,454</b>		<b>\$1,476,114</b>		<b>\$1,116,490</b>	
<i>Expenses</i>						
Program services	1,334,880	79%	1,087,498	81%	1,076,969	83%
Fundraising	132,446	8%	92,283	7%	81,569	6%
Management and general	222,954	13%	158,880	12%	134,340	10%
Total cash expenses	\$1,690,280		\$1,338,661		\$1,292,878	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	0	0%	0	0%	0	0%
Total non-cash expenses	\$0		\$0		\$0	
<b>Total Expenses</b>	<b>\$1,690,280</b>		<b>\$1,338,661</b>		<b>\$1,292,878</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$177,826</b>		<b>\$137,453</b>		<b>-\$176,388</b>	

**2009**

**Freedom to Marry  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
11	55%	45%	0%	None	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
9%	0%	73%	18%	0%	0%

**Locations & Contact**

Freedom to Marry  
116 W. 23rd St., Suite 500  
New York, NY 10011  
212-851-8418  
www.freedomtomarry.org

Additional Locations

None

Legal Names

Freedom to Marry - Fiscal Sponsor - Astraea Foundation

Contact

Evan Wolfson  
Executive Director  
evan@freedomtomarry.org

**Senior Management Profile**

	<u>Lowest</u>	<u>Average</u>	<u>Highest</u>
Tenure with the organization	1.5	3.8	6.0
Compensation	\$110,000	\$135,425	\$160,850

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
5	5	0	80%	20%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
20%	0%	60%	20%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

**Statement of Cash Flow (p3)** - These statements have not been prepared for Freedom to Marry, as cash flow information is part of the aggregate total for the Astraea Foundation, our fiscal sponsor.



*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1978	New England & National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Legal
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,291,845	31
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

End discrimination in New England based on sexual orientation, HIV status, and gender identity and expression.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Eliminate Federal discrimination against legally married same-sex couples through a successful challenge of the section of the Defense of Marriage Act (DOMA) that defines marriage as between a man and a woman for the purpose of federal benefits.
2. Establish marriage equality in each New England state by 2012, working with our state partners in comprehensive, multidimensional campaigns.
3. Working in collaboration in each New England state, draw upon full range of advocacy tactics (legal, legislative, electoral, public education) to achieve full equality for LGBT and HIV+ people.
4. Significantly expand protections for transgender people throughout New England via anti-discrimination laws, litigation, and work on long-term strategies with national players.
5. Expand protections for LGBT people and people living with HIV/AIDS through impact litigation and legislative advocacy, with a focus on ensuring that all New England states respect marriages/domestic partnerships from other states in parenting issues and that HIV+ people have access to the full range of needed health care.

One-year Key Planned Accomplishments for FY2009

1. Litigate federal DOMA case in federal district court, including responding aggressively to the arguments the government will submit in their response to our complaint. We hope to argue this case in the upcoming year, although that is dependent on court scheduling and government readiness.
2. With national legal and advocacy partners, work toward repeal of DOMA, enactment of inclusive ENDA and Uniting American Families Act, change in Bureau of Prison policies regarding transgender prisoners, and recognition of federal employees' and retirees' same-sex relationships. Preserve marriage in ME by defeating "People's Veto" effort, lay groundwork for marriage by legislation in RI in 2011 (requires new governor), and build coalition to fight any legislative repeal efforts in NH.
3. Work to pass transgender non-discrimination protections in NH, CT and MA. Co-counsel case seeking appropriate treatment of transgender individuals in federal prisons.
4. Launch Youth Initiative focusing on issues where GLAD's legal expertise can add strategic and/or tactical value, e.g., harassment, bullying and interference with Gay/Straight Alliances in schools.

Key Accomplishments in FY2008

1. Completed administrative appeals and filed DOMA challenge representing 8 married couples and 3 surviving spouses in federal district court. In preparation, provided plaintiffs with extensive media training and worked with them to clarify key messages. Shortly after filing, we had our first DOMA victory when the State Department changed their policy and will now honor name changes of same-sex couples documented through a marriage license—just as they do for heterosexual couples.
2. Won CT marriage court case, making CT 3rd state to recognize marriage equality. Prepared publications and educated community on marrying in CT. In coalition, defeated ballot proposal to convene CT Constitutional Convention to overturn right to marry. With legislative and other allies, codified marriage equality in CT law.

**2009**

**Gay & Lesbian Advocates & Defenders (GLAD)**

**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. In coalition with state and national partners, passed marriage legislation in VT, ME and NH. **Marriage equality is now law in 5 of 6 New England states.**
4. Launched Transgender Rights Project consolidating GLAD's work to add gender identity and expression to NH, CT and MA non-discrimination laws. Produced video, "Everyone Matters: Dignity and Safety for Transgender People" and (in coalition) convinced MA Registry of Motor Vehicles to update requirements for changing driver's license gender. As co-counsel, launched federal lawsuit challenging Federal Bureau of Prisons' policy on medical treatments for transgender inmates.
5. Filed and then favorably settled lawsuit challenging variance granted to house in NH operating residential program for people with HIV and/or Hepatitis C. Variance allowed blanket exclusion from residential program for people who had been in jail within past year. Settlement effectively ameliorates all harms caused by conditions of the variance.

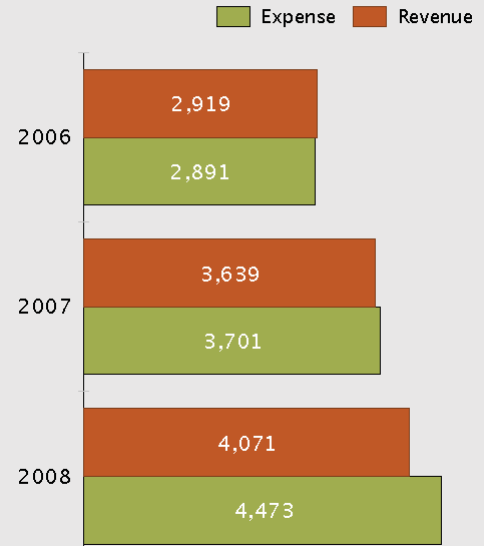
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

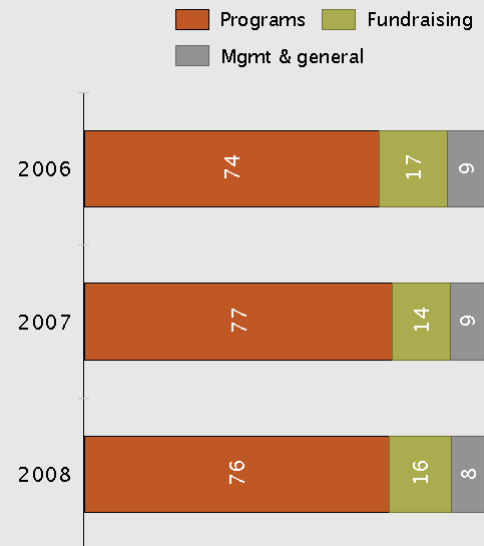
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	11.0	6.4	4.8
Days of working capital	362	279	174
Working capital (\$000)	\$2,366	\$2,229	\$1,608
Average daily cash expense (\$000)	\$6.5	\$8.0	\$9.2
Fundraising expense (cash only) to raise \$1	\$0.22	\$0.20	\$0.22
Total revenue raised through development efforts (\$000)	\$2,186	\$2,620	\$3,105
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	2,030	1,874	1,962
Number of individual donors who gave > \$1,000	405	403	362
Donor turnover (gave > \$35 in prior FY & not this FY)	58%	57%	52%
Number of individuals attending fundraising events (paid > \$100 per person)	870	829	909
Percent of total revenue from top 10 contributors	44%	32%	26%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 20,621	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$847,039	\$762,619	\$1,152,033
Net cash provided (used) by operating activities	389,703	193,241	-509,728
Net cash provided (used) by investing activities	-474,123	196,173	67,441
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	-\$84,420	\$389,414	-\$442,287
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$762,619</u>	<u>\$1,152,033</u>	<u>\$709,746</u>

**2009****Gay & Lesbian Advocates & Defenders (GLAD)****Standard Annual Report**Page 4  
10/9/2009*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview***Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$762,619		\$1,152,033		\$709,746
Investments	1,425,280		1,300,298		853,563
Other current assets	376,547		162,848		368,248
Net fixed assets	52,480		27,613		31,438
Other long-term assets	9,989		109,989		372,384
<b>Total Assets</b>	<b>\$2,626,915</b>		<b>\$2,752,781</b>		<b>\$2,335,379</b>
<b>Liabilities</b>					
Current liabilities	\$198,679		\$385,808		\$323,197
Long-term debt	0		0		0
Other long-term liabilities	0		0		47,668
<b>Total Liabilities</b>	<b>\$198,679</b>		<b>\$385,808</b>		<b>\$370,865</b>
<b>Net Assets</b>					
Unrestricted	1,843,235		1,858,806		1,072,248
Temporarily restricted	585,001		508,167		892,266
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$2,626,915</b>		<b>\$2,752,781</b>		<b>\$2,335,379</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$1,327,060	45%	\$1,568,856	43%	\$1,978,553	49%
Bequests	0	0%	0	0%	50,180	1%
Dues	0	0%	0	0%	0	0%
In-kind contributions	470,798	16%	755,722	21%	1,082,847	27%
Foundation contributions	293,879	10%	453,282	12%	455,597	11%
Corporate contributions/Non-event sponsorships	50,000	2%	50,000	1%	80,000	2%
Government funding	66,257	2%	66,254	2%	66,257	2%
Program income	53,013	2%	60,153	2%	113,447	3%
Fundraising event income	625,500	21%	704,106	19%	717,853	18%
Less costs of direct benefit to donors	-114,817	-4%	-123,597	-3%	-126,794	-3%
Net fundraising event income	\$510,683		\$580,509		\$591,059	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	141,450	5%	101,912	3%	-348,816	-9%
Other revenue	5,525	0%	2,716	0%	1,539	0%
<b>Total Revenue</b>	<b>\$2,918,665</b>		<b>\$3,639,404</b>		<b>\$4,070,663</b>	
<b>Expenses</b>						
Program services	1,633,437	57%	2,072,137	56%	2,308,149	52%
Fundraising	484,836	17%	524,163	14%	694,122	16%
Management and general	266,866	9%	320,064	9%	371,782	8%
Total cash expenses	\$2,385,139		\$2,916,364		\$3,374,053	
Non-cash expenses						
In-kind	470,798	16%	755,722	20%	1,082,847	24%
Depreciation	35,050	1%	28,581	1%	16,222	0%
Total non-cash expenses	\$505,848		\$784,303		\$1,099,069	
<b>Total Expenses</b>	<b>\$2,890,987</b>		<b>\$3,700,667</b>		<b>\$4,473,122</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$27,678</b>		<b>-\$61,263</b>		<b>-\$402,459</b>	

**2009 Gay & Lesbian Advocates & Defenders (GLAD)**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
18	39%	55%	6%	Each board member required to make an annual personal gift to GLAD; collaborate with development staff and the board to identify/cultivate/solicit/sustain donors; set individual annual fundraising goals; raising goals; and participate in fundraising training and skill building.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
28%	0%	72%	0%	0%	0%

Gay & Lesbian Advocates & Defenders (GLAD)  
 30 Winter St., Suite 800  
 Boston, MA 02108  
 617-426-1350  
 www.glad.org

Additional Locations

Easthampton MA

Legal Names

Park Square Advocates, Inc.  
 d/b/a GLAD - 501(c)(3)

Contact

Lee Swislow  
 Executive Director  
 lswislow@glad.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	4.5	6.8	11.5
Compensation	\$90,000	\$111,645	\$148,500

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
31	24	7	29%	61%	10%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
10%	10%	74%	6%	0%	13%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Days of Working Capital & Use of BDNA Funds** – In GLAD's FY2008 budget, the Board approved spending almost \$200,000 from Board Designated Net Asset reserves to fund several new initiatives, including GLAD's Transgender Rights Project and the launch of a Youth Initiative. In addition, the Board approved an expansion of our work on marriage throughout New England. As we started FY2008, we had approximately 290 days of working capital. With the spending on these new strategic initiatives, we intended to maintain a fiscally prudent reserve of 3 - 6 months operating revenue. We did not anticipate the meltdown of the economy. Because some of our reserves were invested in the stock market, the value of our portfolio declined. We also saw a decrease in contributions. This resulted in a higher than anticipated operating loss and a larger than expected decrease in our number of days of working capital. We were fortunate, though, to secure several significant multi-year commitments, thus increasing our revenue in FY2008. For FY2009, we cut expenses by almost 7% and are expecting to end the year without an operating loss. With increases in the stock market, our portfolio is also regaining some of it's value.
- Revenue vs. Expenses** – In addition to what is noted above, the 2008 expenses reflect a increase of more than \$300,000 in in-kind legal expenses, primarily from our DOMA case.
- Individual Donors Who Gave More Than \$35** – We successfully increased the number of new donors in 2008.

**2009**

**Gay & Lesbian Advocates & Defenders (GLAD)**

**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

4. **Number Attending Fundraising Events** – We worked hard to increase attendance at our major special event and were able to reach our financial goal as a result. For the matching challenge that evening, while the average gift was significantly lower, the number of gifts was higher, thus enabling us to raise the same amount as the previous year.
5. **Percent of Total Revenue from Top 10 Contributors** – Our overall experience in 2008 was that several higher-level donors reduced their giving, resulting in a lower percentage of revenue from the top 10 contributors. This broadens our donor base.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
<b>1985</b>	<b>National</b>
<i>Fiscal Year</i>	<i>Type</i>
<b>Jan - Dec</b>	<b>Issue</b>
<i>2009 Budget</i>	<i>Total Paid Staff</i>
<b>\$9,023,000</b>	<b>46</b>
<i>Tax Status*</i>	
<b>501(c)(3)</b>	<b>100%</b>

\* Percent of latest FY revenue.

**Mission**

Promote and ensure fair, accurate and inclusive representation of LGBT people and events in the media as a means of eliminating homophobia and discrimination based on gender identity and sexual orientation. Research shows that what people see about LGBT people in the media affects the way they treat LGBT friends, family members, neighbors, and co-workers, as well as how they think about LGBT political/social issues.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Implement Board approved strategic plan that focuses on the areas of organizational awareness, diversified revenue support, increasing capacity with senior volunteers, programmatic review, and communication of organizational results through qualitative and quantitative metrics.
2. Increase positive opinion of LGBT people among moveable middle audiences by working with media to decrease LGBT defamation and increase the number of fair, accurate and inclusive representations of the LGBT community and by placing trained media spokespeople who can share relevant personal stories with media outlets.
3. Heighten national, local, and statewide support for the LGBT community with respect to local issues (e.g., legislation, court cases) through partnerships with LGBT and allied organizations on messaging and media strategy.
4. Change perceptions of LGBT community by increasing quality and diversity of media images of under-represented groups within LGBT community (e.g., people of color), making public more conscious of our diversity and fostering understanding and respect.
5. Conduct public education/messaging campaigns around 2012 elections, mainline religious summits and federal and state legislation and executive appointments (i.e., surgeon general) by educating journalists; providing partners and community members with media/communications strategy resources; capitalizing on media opportunities to heighten LGBT visibility; and tying LGBT issues to broader equality and justice themes.
6. Work in targeted communities to foster awareness and affirmation of the LGBT community by working with media outlets that focus on young adults and people of faith, as well as with sports media, advertising, and digital media outlets.

One-year Key Planned Accomplishments for FY2009

1. Respond to 2 to 3 instances/month of LGBT defamation in media by working with media professionals, stimulating constituent calls, and/or distributing gladBLOG posts via Facebook and Twitter while educating audiences on terminology and decreasing public tolerance for anti-LGBT discrimination.
2. Train 2,000 media spokespeople, including community members, experts and LGBT movement leaders, to speak on broad set of issues affecting LGBT community; pitch spokespeople and their relevant stories to national/regional/local media outlets to humanize and foster understanding of LGBT people.
3. Conduct 10 meetings/month with high-level media professionals nationwide and in priority states to educate them on GLAAD resources, pitch relevant story ideas and offer suggestions for improving and diversifying LGBT community coverage.
4. Increase effectiveness of LGBT and allied leaders'/organizations' media advocacy efforts by developing media messaging plans for statewide organizations pursuing policy advances or rollbacks; providing 1-on-1 communications/messaging recommendations; conducting media trainings/interview prep sessions; and creating print/online resources.

**2009**

**Gay & Lesbian Alliance Against Defamation (GLAAD)**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

5. Collaborate on Transgender Messaging Research Project, which will establish and publish research-based best practices for addressing anti-trans messages (e.g., "bathroom arguments") and develop preliminary frameworks for public education to increase understanding and support of trans people and issues.
6. Increase awareness and support for LGBT issues and GLAAD's media advocacy and anti-defamation work in digital and online communities (e.g., gladBLOG, Facebook, Twitter and YouTube). Work with companies organizing virtual communities (e.g. Xbox LIVE, Facebook) to create LGBT-inclusive online environments.
7. Expand GLAAD's Advertising Media Program with resources developed by the former Commercial Closet Association (e.g., their ad media library) and increase our efforts to monitor, analyze and respond to print, broadcast and online ads that unfairly, inaccurately or non-inclusively represent LGBT people and issues. Hold 1st Advertising Media Awards to recognize fair, accurate and inclusive LGBT images in advertising.

Key Accomplishments in FY2008

1. Adapted best practices in *LGBT Movement Communications Toolkit* to 3-page "Talking About" series that helps advocacy organizations and community members speak more effectively and persuasively about LGBT issues.
2. Conducted 213 GLAAD media trainings with local and national organizations in 59 cities for a total of 2,463 advocates trained.
3. Executed 1,634 meetings with 3,753 media professionals and journalists and 1,628 meetings with 3,224 community advocates from various organizations and movie production teams. Held 70 events, including Pride events, film festivals, presentations at universities, and panels at screenings and professional events.
4. Placed 19 GLAAD public service ads by top-level celebrities on TV/Internet in English/Spanish to educate moveable middle about the power of words and to enlist their support.
5. Achieved GLAAD mention or quote in 441 stories in local and national media outlets; pitched 374 stories; placed 334 stories that featured GLAAD-trained spokespeople; and provided resources for 157 stories.
6. Issued 87 press releases, 12 editions of "Best & Worst of National News," and urged constituents to respond directly to both problematic and good media coverage.
7. Developed 5 comprehensive strategic communications plans for local and statewide LGBT organizations.
8. Hosted Queer Lounge at The Sundance Film Festival for the 2nd year.
9. Launched gladBLOG, which analyzes coverage and raises the visibility of LGBT issues in the media, garnering 57,894 visits and 89,932 pageviews from Aug to Dec 2008. Visits are growing exponentially in 2009.
10. Increased activity on GLAAD's YouTube Channel (re-posts news and other media content for general viewing and re-posting by bloggers) and joined YouTube's nonprofit network. As of 6/09, GLAAD was #71 among "Most Subscribed (All Time) - Non-Profit" and #67 among "Most Viewed (All Time) - Non-Profit."
11. Increased GLAAD's presence on Facebook and Twitter to expand constituent base and provide real-time LGBT news and updates.

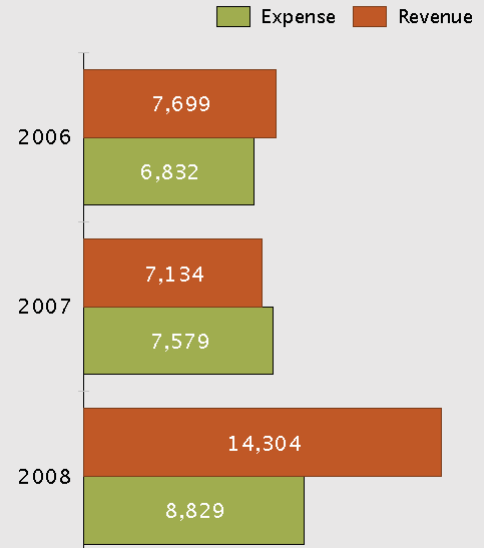
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

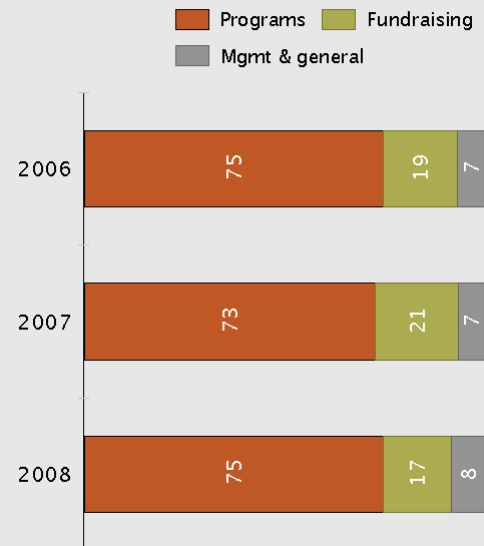
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	8.0	5.8	4.9
Days of working capital	334	271	191
Working capital (\$000)	\$6,018	\$5,427	\$4,498
Average daily cash expense (\$000)	\$18.0	\$20.0	\$23.5
Fundraising expense (cash only) to raise \$1	\$0.15	\$0.21	\$0.10
Total revenue raised through development efforts (\$000)	\$7,552	\$7,018	\$14,298
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	7,920	8,092	8,684
Number of individual donors who gave > \$1,000	622	774	507
Donor turnover (gave > \$35 in prior FY & not this FY)	56%	70%	56%
Number of individuals attending fundraising events (paid > \$100 per person)	1,770	4,442	4,961
Percent of total revenue from top 10 contributors	25%	26%	68%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 206,500	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$2,800,636	\$2,704,360	\$1,682,305
Net cash provided (used) by operating activities	592,949	-1,053,785	-408,747
Net cash provided (used) by investing activities	-652,807	35,041	2,232
Net cash provided (used) by financing activities	-36,418	-3,311	0
Net increase (decrease) in cash	<u>-\$96,276</u>	<u>-\$1,022,055</u>	<u>-\$406,515</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$2,704,360</u>	<u>\$1,682,305</u>	<u>\$1,275,790</u>

# 2009 Gay & Lesbian Alliance Against Defamation (GLAAD)

## Standard Annual Report

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

### Statement of Financial Position

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
<b>Assets</b>			
Cash and cash equivalents	\$2,704,360	\$1,682,305	\$1,275,790
Investments	2,682,488	2,803,542	2,810,166
Other current assets	1,304,706	1,708,837	1,239,229
Net fixed assets	319,355	496,499	539,375
Other long-term assets	35,750	4,535	6,239,270
<b>Total Assets</b>	<b>\$7,046,659</b>	<b>\$6,695,718</b>	<b>\$12,103,830</b>
<b>Liabilities</b>			
Current liabilities	\$673,933	\$767,878	\$826,993
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$673,933</b>	<b>\$767,878</b>	<b>\$826,993</b>
<b>Net Assets</b>			
Unrestricted	6,057,719	5,456,186	5,248,691
Temporarily restricted	315,007	471,654	6,028,146
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$7,046,659</b>	<b>\$6,695,718</b>	<b>\$12,103,830</b>

### Statement of Activities

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$4,345,189	56%	\$4,060,216	57%	\$3,955,907	28%
Bequests	92,825	1%	112,856	2%	6,562,215	46%
Dues	0	0%	0	0%	0	0%
In-kind contributions	96,000	1%	115,500	2%	225,950	2%
Foundation contributions	1,017,079	13%	1,103,551	15%	1,335,754	9%
Corporate contributions/Non-event sponsorships	117,500	2%	106,342	1%	309,075	2%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	3,860,811	50%	3,708,428	52%	4,203,758	29%
Less costs of direct benefit to donors	-2,002,127	-26%	-2,188,743	-31%	-2,294,558	-16%
Net fundraising event income	\$1,858,684		\$1,519,685		\$1,909,200	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	147,415	2%	190,957	3%	-266,520	-2%
Other revenue	24,769	0%	-75,246	-1%	272,264	2%
<b>Total Revenue</b>	<b>\$7,699,461</b>		<b>\$7,133,861</b>		<b>\$14,303,845</b>	
<b>Expenses</b>						
Program services	4,968,064	73%	5,375,343	71%	6,398,619	71%
Fundraising	1,139,962	17%	1,455,823	19%	1,458,799	16%
Management and general	462,125	7%	473,879	6%	734,256	8%
Total cash expenses	\$6,570,151		\$7,305,045		\$8,591,674	
Non-cash expenses						
In-kind	96,000	1%	115,500	2%	225,950	3%
Depreciation	165,799	2%	158,202	2%	137,224	2%
Total non-cash expenses	\$261,799		\$273,702		\$363,174	
<b>Total Expenses</b>	<b>\$6,831,950</b>		<b>\$7,578,747</b>		<b>\$8,954,848</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$867,511</b>		<b>-\$444,886</b>		<b>\$5,348,997</b>	

**2009 Gay & Lesbian Alliance Against Defamation (GLAAD) Standard Annual Report** Page 5  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>		Gay & Lesbian Alliance Against Defamation (GLAAD) 5455 Wilshire Blvd. Suite 1500 Los Angeles, CA 90036 323-933-2240 www.glaad.org
31	65%	35%	0%	Directors are expected to secure \$25,000 in fundraising for GLAAD		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
16%	7%	71%	3%	0%	3%	<u>Additional Locations</u>
Senior Management Profile						New York
			<i>Lowest</i>	<i>Average</i>	<i>Highest</i>	<u>Legal Names</u>
Tenure with the organization			0.1	2.2	4.2	Gay & Lesbian Alliance Against Defamation - 510(c)(3)
Compensation			\$85,000	\$152,000	\$250,000	
Paid Staff						<u>Contact</u>
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	Jarrett Barrios President barrios@glaad.org
46	46	0	63%	37%	4%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
15%	6%	61%	15%	0%	3%	
<p><i>Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>						

**Organization's Notes and Advisories**

1. **Cash and Investment Balances** - In the spirit of ensuring GLAAD's financial strength, in FY1996 the GLAAD Board of Directors created a reserve fund policy. This fund is comprised of an amount equal to 25% of the organization's annual operating expenses. At the end of FY2008, the reserve fund was \$2.8 million, separate from operating cash.
2. **New Investment and Endowment Policy** - At the February 2009 National Board of Directors meeting, the Board moved to accept new policies that established a socially responsible endowment and investment policy for inclusion of organizations with positive LGBT inclusive practices.
3. **New President** - Jarrett T. Barrios joined GLAAD after serving nine years in the Massachusetts legislature and two and a half years advocating for access to care and coverage for residents of Massachusetts as the president of the Blue Cross Blue Shield of Massachusetts Foundation. He was the first Latino and first openly gay man elected to the state Senate. Jarrett T. Barrios joined GLAAD in September 2009.



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**Gay & Lesbian Victory Fund and Leadership Institute**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1991	National & International
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,984,047	16
<i>Tax Status*</i>	
501(c)(3)	41%
527 PAC	59%

\* Percent of latest FY revenue.

**Mission**

**Gay & Lesbian Victory Fund:** To change the face and voice of America's politics and achieve equality for LGBT Americans by increasing the # of openly LGBT officials at all levels of government. Victory is the only national organization dedicated to increasing the # of LGBT elected officials at all levels of government in the US, so that the LGBT community has a seat at the table and strong, authentic voices at all levels of government.

**Gay & Lesbian Leadership Institute:** To achieve full equality for LGBT people by building, supporting, and advancing a diverse network of LGBT public leaders.

**Key Planned Accomplishments**

*Five-year Key Planned Accomplishments for FY2009-2013*

**Note:** Because our current Strategic Plan goes through 2010, the information below is for years FY2007-2010. Contact Chuck Wolfe (202-842-7302) for more information on below goals, as specific and measurable targets exist but are closely held.

**Gay & Lesbian Victory Fund (Victory Fund)**

By 2011, Victory Fund intends to increase the overall # of openly LGBT elected officials in the US by 25%, to 430+. *Note that all references to LGBT officials below mean openly LGBT.*

- Breakthrough Races** – Support first-of-a-kind LGBT candidates/campaigns within a state (i.e., 1st LGBT elected official or 1st elected to statewide office, to state legislature, to state appellate court, or to a major city government). Toward that end:
  - Reduce # of states with no LGBT elected person (Horizon States) and with no LGBT state legislator (Legislative Horizon States).
  - Elect LGBT mayors in several of the 50 most populated cities and increase # of major cities with 1+ LGBT council member.
  - Double # of LGBT statewide/federal elected officials and increase # of LGBT state appellate judges.
- Strengthening Our Influence Races** - Support candidates/campaigns where the election of an openly LGBT individual contributes to the creation of a critical mass of LGBT legislators, enabling them to form a voting bloc or otherwise effectively and efficiently exercise political power and signifying the LGBT community's maturing role and increasing influence in electoral politics. Toward that end:
  - Increase # of state legislatures and # of major city councils with 2+ LGBT members.
  - Increase # of county commissions and school boards with 2+ LGBT members.
  - Increase # of state legislatures with 5+ LGBT members.
- Building The Team Races** - Support candidates/campaigns that develop or expand a deep roster of elected LGBT individuals demonstrably interested in and capable of seeking higher office from an entry-level elected position, thus providing a pipeline for Breakthrough Races and Strengthening Our Influence Races. Specific goals include:
  - Each election cycle, increase # of LGBT 1st-time candidates and # of LGBT incumbents seeking endorsement.
  - Ensure that 60%+ of Victory Fund's political funds are directed to 1st-time candidates.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Gay & Lesbian Leadership Institute (GLLI)**

GLLI identifies and develops the professional talents and management skills of high-performing/high-potential LGBT individuals by providing meaningful opportunities to come together and learn from experts and each other. GLLI actively promotes collaboration among individuals and organizations toward a common vision for the movement.

1. Increase the # and diversity of LGBT leaders in public roles:
  - Increase # of openly LGBT officials by more than 20% each year, reaching a minimum of 1000 openly LGBT officials by 2010.
  - Help at least one official come out while in office each year.
  - Identify 1000 leaders as potential Presidential Appointees.
  - Ensure 20% of all training participants are people of color.
2. Cultivate the skills and talents of LGBT leaders to strengthen their ability to lead effectively
  - Increase annual leaders attending the Candidate & Campaign training to 200 per cycle by 2010.
  - Increase annual *David Bohnett Harvard Leadership Fellows* to 15; or 80 total fellows by 2010.
3. Create opportunities for a diverse network of LGBT leaders to share ideas and experiences and foster learning and professional development
  - Increase Leadership Conference annual attendance from 321 in 2007 to 375 in 2010.
  - Ensure 25% of known out officials participate in the Out Leaders List Serve by 2010.
4. Positively impact public perceptions about the role of LGBT leaders to eliminate barriers for participation in public life
  - Grow the readership of the Gay & Lesbian Leadership *SmartBrief* to 22,000 by 2010.
  - Increase media impressions about the impact of LGBT leaders.

One-year Key Planned Accomplishments for FY2009

**Gay & Lesbian Victory Fund**

1. **Breakthrough Races:** Increase # of major cities with an LGBT mayor from 1 to 2; and increase # of major cities with 1+ LGBT council member from 19 to 20.
2. **Strengthening Our Influence Races:** Increase # of major cities with 2+ LGBT council members from 6 to 8.
3. **Building the Team Races:**
  - Increase portion of LGBT incumbents seeking endorsement in any year to 50%.
  - Grow LGBT candidate pipeline by directing 60+% of all political funds to 1st-time candidates.
  - Increase # of LGBT elected officials to 439 (1 year in advance of deadline in 2006-2010 plan).

**Gay & Lesbian Leadership Institute**

1. Increase # of LGBT elected/appointed officials in GLLI Leadership Network from 599 to 659 (+10%).
2. Increase # of participants in Candidate & Campaign Training and Gay & Lesbian Leadership Conference from 645 to 675 (+5%).
3. Increase # of *David Bohnett Gay & Lesbian Leadership Fellows* at Harvard from 11 to 15 (+36%).
4. Help 1+ public official come out while in office.

Key Accomplishments in FY2008

**Gay & Lesbian Victory Fund**

**1. Breakthrough Races:**

- Eliminated 2 Horizon States (no LGBT elected officials) with election of Nick Shalosky to Charleston County Constituent School Board (SC) and Thomas Robichaux to Orleans Parish School Board (LA).
- Increased # of LGBT members of the US House of Representatives from 2 to 3 by electing Jared Polis to CO's 2nd Congressional District.
- Increased # of major cities with an LGBT mayor by electing Sam Adams Mayor of Portland, OR.
- Assisted Kate Brown in her successful campaign for OR Secretary of State.

**2. Strengthening Our Influence Races**

- Increased # of state legislatures with 2+ LGBT members by helping elect Sue Schaffer and Mark Ferrandino to CO State House (joining Jennifer Veiga), and Deb Mell to IL State House (joining Representative Greg Harris).
- Added 3 state legislatures with 5+ LGBT legislators: AZ, MA, and WA.

**2009**

**Gay & Lesbian Victory Fund and Leadership Institute**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**3. Building the Team Races:**

- Increased # of incumbents applying for endorsement by 11%.
- Directed 77% of all political funds to 1st-time candidates (vs. goal of 60%).

**4. Gay & Lesbian Leadership Institute**

- Increased # of American LGBT elected/appointed officials in Leadership Network from 534 to 599 (+12%).
- Increased # of training attendees from 470 to 645 (+37%).
- Increased # *David Bohnett Gay & Lesbian Leadership* Fellows at Harvard from 10 to 11 (+10%).
- Assisted CT State Representative Jason Bartlett in coming out to constituents.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

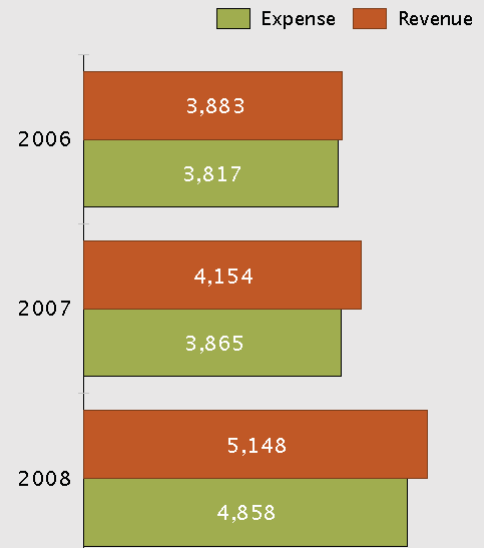
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	4.2	23.0	8.5
Days of working capital	61	91	85
Working capital (\$000)	\$630	\$955	\$1,123
Average daily cash expense (\$000)	\$10.3	\$10.4	\$13.2
Fundraising expense (cash only) to raise \$1	\$0.09	\$0.07	\$0.06
Total revenue raised through development efforts (\$000)	\$3,599	\$4,015	\$5,039

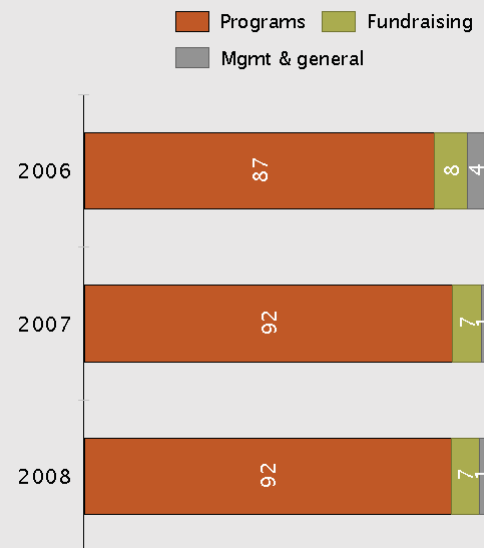
Indicators of Contributor Base

Number of individual donors who gave > \$35	3,169	2,487	2,498
Number of individual donors who gave > \$1,000	291	290	389
Donor turnover (gave > \$35 in prior FY & not this FY)	78%	86%	69%
Number of individuals attending fundraising events (paid > \$100 per person)	549	517	553
Percent of total revenue from top 10 contributors	52%	43%	39%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 37,237	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$706,823	\$592,103	\$998,774
Net cash provided (used) by operating activities	-5,320	406,671	140,616
Net cash provided (used) by investing activities	-109,400	0	-150,000
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	-\$114,720	\$406,671	-\$9,384
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$592,103</u>	<u>\$998,774</u>	<u>\$989,390</u>

**2009**

# Gay & Lesbian Victory Fund and Leadership Institute

## Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

<u>Assets</u>	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalents	\$592,103	\$998,774	\$989,390
Investments	0	0	0
Other current assets	180,476	159	250,514
Net fixed assets	113,622	77,379	49,977
Other long-term assets	20,659	20,659	170,659
<b>Total Assets</b>	<b>\$906,860</b>	<b>\$1,096,971</b>	<b>\$1,460,540</b>
<u>Liabilities</u>			
Current liabilities	\$142,217	\$43,500	\$116,975
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$142,217</b>	<b>\$43,500</b>	<b>\$116,975</b>
<u>Net Assets</u>			
Unrestricted	584,343	1,028,471	475,123
Temporarily restricted	180,300	25,000	868,442
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$906,860</b>	<b>\$1,096,971</b>	<b>\$1,460,540</b>

### Statement of Activities

<u>Support &amp; Revenue</u>	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>	
Individual contributions	\$2,335,754	60%	\$2,687,229	65%	\$3,424,431	67%
Bequests	99,167	3%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	9,636	0%	15,526	0%	28,245	1%
Foundation contributions	793,363	20%	931,622	22%	1,193,200	23%
Corporate contributions/Non-event sponsorships	215,948	6%	148,840	4%	249,241	5%
Government funding	0	0%	0	0%	0	0%
Program income	170,026	4%	116,570	3%	90,410	2%
Fundraising event income	369,233	10%	306,387	7%	219,257	4%
Less costs of direct benefit to donors	-125,028	-3%	-74,122	-2%	-75,669	-1%
Net fundraising event income	\$244,205		\$232,265		\$143,588	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	11,132	0%	14,740	0%	12,190	0%
Other revenue	3,558	0%	7,164	0%	6,988	0%
<b>Total Revenue</b>	<b>\$3,882,789</b>		<b>\$4,153,956</b>		<b>\$5,148,293</b>	
<u>Expenses</u>						
Program services	3,337,818	87%	3,508,238	91%	4,415,614	91%
Fundraising	306,305	8%	266,595	7%	318,613	7%
Management and general	131,572	3%	38,526	1%	68,325	1%
Total cash expenses	\$3,775,695		\$3,813,359		\$4,802,552	
Non-cash expenses						
In-kind	9,636	0%	15,526	0%	28,245	1%
Depreciation	31,530	1%	36,243	1%	27,402	1%
Total non-cash expenses	\$41,166		\$51,769		\$55,647	
<b>Total Expenses</b>	<b>\$3,816,861</b>		<b>\$3,865,128</b>		<b>\$4,858,199</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$65,928</b>		<b>\$288,828</b>		<b>\$290,094</b>	

2009

**Gay & Lesbian Victory Fund and Leadership Institute**  
**Standard Annual Report**

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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

Total	Male	Female	Transgender	Fundraising Requirements
24	79%	21%	0%	<b>Gay &amp; Lesbian Victory Fund</b> - Contribute or raise a minimum of \$35,000/year <b>Gay &amp; Lesbian Leadership Institute</b> - Contribute or raise a minimum of \$35,000/year *The Victory Fund and GLLI have separate boards of 13 and 11 members, respectively.
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>
8%	0%	0%	5%	8%
				<i>Other</i>
				79%

**Locations & Contact**

Gay & Lesbian Victory Fund and Leadership Institute  
 1133 15th St., NW, Suite 350  
 Washington, DC 20005  
 202-842-7302  
 www.victoryfund.org  
 www.glli.org

Additional Locations

None

Legal Names

Gay & Lesbian Victory Fund, Inc. - 527 PAC  
 Gay & Lesbian Leadership Institute, Inc. - 501(c)(3)

Contact

Chuck Wolfe  
 President & CEO  
 chuck.wolfe@victoryfund.org  
 chuck.wolfe@glli.org

**Senior Management Profile**

	Lowest	Average	Highest
Tenure with the organization	0.5	3.4	6.0
Compensation	\$87,250	\$124,717	\$222,500

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
16	16	0	81%	19%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
6%	6%	0%	12%	12%	64%

Note: Board and staff data as of 1/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

**Gay & Lesbian Victory Fund**

- Candidate Bundling** - Funds raised for candidates have been added to the audited financial statements and presented here in the statement of activities as additional revenue within "Individual contributions" and as additional expense within "Program services" in order to actually reflect the full scope of Victory Fund work, programs, and fundraising. These contributions are disclosed in the notes to the audited financial statements, but are not considered revenue to Gay & Lesbian Victory Fund because these funds are deposited directly into candidates' accounts. In FY2003, FY2004, FY2005, FY2006, FY2007, and FY2008 candidate bundling totaled \$67,650, \$426,009, \$319,349, \$455,354, \$510,655, and \$858,058 respectively.
- Contributor Base** - The inclusion of funds raised for candidates in the audited financial statements has a misleading effect on donor retention rates as many individuals give through Victory to support specific candidates and may not have an interest in candidates in subsequent cycles for a variety of reasons, such as geographic proximity to donor and type/level of office sought. While the Victory Fund supports significant numbers of candidates in both "odd" and "even" years, we do support more candidates in even years, which creates a natural "spike" in donations and donors in even years.

**Gay & Lesbian Leadership Institute**

- Founding & History** - The Gay and Lesbian Leadership Institute was founded in 1993. In 2005 GLLI merged with the International Network of Gay and Lesbian Officials (INGLO), which has been in continual operation since 1984.

**2009**

**Gay Community Center of Richmond**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1999	Central Virginia
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,817,977	16
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Develop and help sustain organizations, programs and services that contribute to a vibrant Central Virginia community that shares our values of diversity, inclusion, individual dignity, equality and civic engagement.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Cement GCCR's position as the "go-to" education, cultural, social and advocacy agency serving LGBT people of Central VA by building coalitions and improving the impact of our Central Virginia Rainbow Partnership consortium. (Please go to the following URL: [http://gayrichmond.com/GCCR/index.php?option=com\\_content&view=section&id=2&Itemid=16](http://gayrichmond.com/GCCR/index.php?option=com_content&view=section&id=2&Itemid=16)).
2. Develop and produce programming that meets demonstrated needs of Central VA's LGBT people, as determined through professional research and interaction with partner agencies and groups.
3. Achieve annual increases in FY2010-2014 in direct financial support from individuals, corporations and foundations through campaigns tied to our accomplishments and growing menu of programming and services.
4. Achieve annual increases in our base of individual members – LGBT people, friends and allies – who value our work and recognize our vital role in the community, and feel they belong at the GCCR.
5. Complete renovation of our 47,000 sq. ft. facility by adding space to house and directly support partner agencies and groups.

One-year Key Planned Accomplishments for FY2009

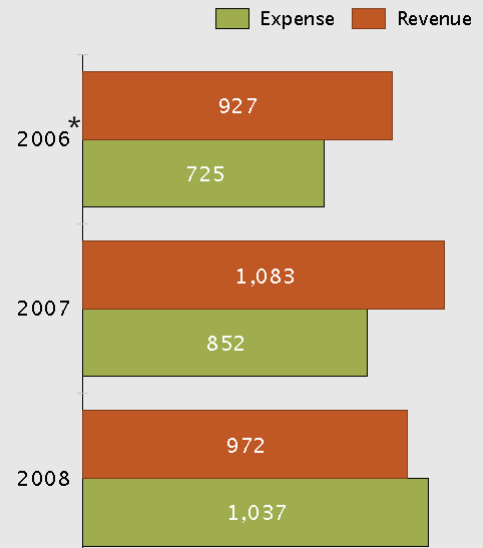
1. Increase membership in Central Virginia Rainbow Partnership from 20 to 30 groups, effectively including all groups and agencies serving Central VA's LGBT people.
2. Complete community survey process, publish results, and use data collected to develop up to 5 key programming initiatives. Secure funding needed to implement 2+ initiatives. Candidate programs include seasonal calendar of educational programming, legal and financial skills clinics, job counseling services, and monthly musical performance series.
3. Increase direct, non-event funding from individuals, corporations and foundations by 50% over 2009.
4. Increase membership from 150 to 750 "card carrying members." GCCR's membership concept at has traditionally been fluid and we have recently begun a program to obtain affirmative commitments.
5. Complete architectural design of remaining 15,000 sq.ft. of unrenovated space to accommodate priority uses to be identified in community survey.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

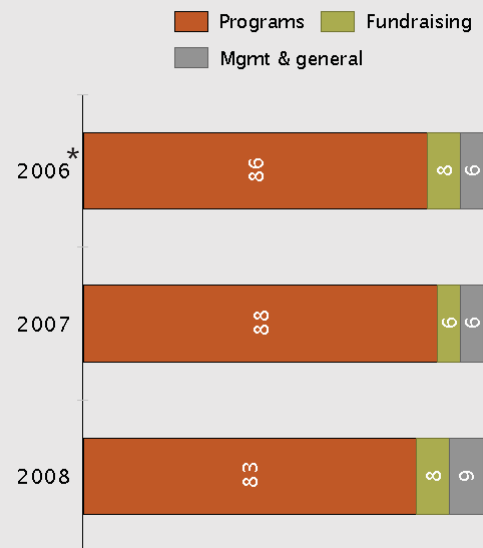
**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006*	2007	2008
Liquidity ratio	N/A	0.4	1.3
Days of working capital	N/A	7	39
Working capital (\$000)	N/A	\$16	\$108
Average daily cash expense (\$000)	\$1.9	\$2.3	\$2.8
Fundraising expense (cash only) to raise \$1	\$0.21	\$0.11	\$0.21
Total revenue raised through development efforts (\$000)	\$288	\$453	\$404

Indicators of Contributor Base

Number of individual donors who gave > \$35	18	19	17
Number of individual donors who gave > \$1,000	2	1	7
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	N/A	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	0	0	0
Percent of total revenue from top 10 contributors	12%	17%	3%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 1,142	

**Statement of Cash Flows**

	<u>Audited 2006*</u>	<u>Audited 2007</u>	<u>Audited 2008**</u>
Cash and cash equivalent balance at beginning of year	\$19,104	\$85,907	\$47,564
Net cash provided (used) by operating activities	239,319	200,992	130,095
Net cash provided (used) by investing activities	-213,690	-652,293	215,199
Net cash provided (used) by financing activities	41,174	412,958	-75,702
Net increase (decrease) in cash	\$66,803	-\$38,343	\$269,592
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$85,907</u>	<u>\$47,564</u>	<u>\$317,156</u>

\* Reported on a cash basis

\*\* Qualified audit opinion for FY2008 only

**2009**

# Gay Community Center of Richmond

## Standard Annual Report

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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

### Statement of Financial Position

<u>Assets</u>	<u>Audited</u> <u>2006*</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008**</u>
Cash and cash equivalents	\$85,907		\$47,564		\$317,156
Investments	0		0		0
Other current assets	0		100,000		30,500
Net fixed assets	691,194		2,072,275		1,885,842
Other long-term assets	987,546		232,966		144,811
<b>Total Assets</b>	<b>\$1,764,647</b>		<b>\$2,452,805</b>		<b>\$2,378,309</b>
<u>Liabilities</u>					
Current liabilities	\$79,253		\$132,053		\$239,596
Long-term debt	950,377		1,354,687		1,237,124
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$1,029,630</b>		<b>\$1,486,740</b>		<b>\$1,476,720</b>
<u>Net Assets</u>					
Unrestricted	735,017		866,065		879,089
Temporarily restricted	0		100,000		22,500
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$1,764,647</b>		<b>\$2,452,805</b>		<b>\$2,378,309</b>

### Statement of Activities

<u>Support &amp; Revenue</u>	<u>Audited</u> <u>2006*</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008**</u>	
Individual contributions	\$5,761	1%	\$1,880	0%	\$20,999	2%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	111,000	12%	175,000	16%	10,000	1%
Corporate contributions/Non-event sponsorships	1,119	0%	5,238	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	610,839	66%	618,393	57%	513,616	53%
Fundraising event income	1,659,829	179%	1,769,619	163%	2,524,083	260%
Less costs of direct benefit to donors	-1,489,892	-161%	-1,498,251	-138%	-2,151,068	-221%
Net fundraising event income	\$169,937		\$271,368		\$373,015	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	28,624	3%	11,401	1%	54,773	6%
<b>Total Revenue</b>	<b>\$927,280</b>		<b>\$1,083,280</b>		<b>\$972,403</b>	
<u>Expenses</u>						
Program services	607,754	84%	732,716	86%	843,379	81%
Fundraising	60,408	8%	49,281	6%	83,941	8%
Management and general	40,511	6%	47,210	6%	87,833	8%
Total cash expenses	\$708,673		\$829,207		\$1,015,153	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	16,080	2%	23,025	3%	21,726	2%
Total non-cash expenses	\$16,080		\$23,025		\$21,726	
<b>Total Expenses</b>	<b>\$724,753</b>		<b>\$852,232</b>		<b>\$1,036,879</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$202,527</b>		<b>\$231,048</b>		<b>-\$64,476</b>	

\* Reported on a cash basis

\*\* Qualified audit opinion for FY2008 only

**2009**

**Gay Community Center of Richmond  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>		Gay Community Center Richmond 1407 Sherwood Ave Richmond, VA 23220 804-622-4646 <a href="http://gayrichmond.com">http://gayrichmond.com</a>  <u>Additional Locations</u> None  <u>Legal Names</u> Richmond Gay Community Foundation - 501(c)(3)  <u>Contact</u> Jay Squires President <a href="mailto:jsquires@gayrichmond.com">jsquires@gayrichmond.com</a>
8	50%	50%	0%	Each board member is expected to make or obtain through personal efforts a contribution in an amount that is set through group board discussion and individual discussion with the Board Chair. Each board member is also expected to participate in other fundraising activities, and to provide contacts and networks through which additional fundraising opportunities are developed.		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
0%	0%	100%	0%	0%	0%	
Senior Management Profile						
		<u>Lowest</u>	<u>Average</u>	<u>Highest</u>		
Tenure with the organization		0.5	3.8	7.0		
Compensation		\$31,500	\$48,250	\$70,000		
Paid Staff						
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	
16	8	8	62%	38%	0%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
38%	0%	62%	0%	0%	6%	
<i>Note: Board and staff data as of 8/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i>						

**Organization's Notes and Advisories**

- Board Designated Reserves** – The FY2006, FY2007 and FY2008 unrestricted net asset balances include monies set aside by the as reserve funds. The reserve balances were: FY2006 - \$17,188, FY2007 - \$6,776, FY2008 - \$289,000.
- Fundraising Event Income** – A substantial portion of GCCR revenue flows from our operation of bingo games which are held three times each week. Revenue from this activity is included in this report as fundraising event income and the full cost of the bingo operations are included in costs of direct benefit to donors line item.
- FY2009 Budget** – The budget figure reported in the Snapshot section (p.1) appears significantly higher than total expense reported in the Statement of Activities because it includes bingo-related expenses. In the Statement of Activities, these expenses are reported reported in the revenue section where they are netted against gross bingo income.
- FY2008 Audit** – The FY2008 audit is the first audit conducted since the basis of our accounting changed from cash to accrual. As a result, a number of audit adjustments were made in order to restate cash-based balances. The auditors noted an exception to GAAP based on the fact that GCCR does not assign a fair market value to items donated for sale through our thrift store. As a practical matter, given the volume and nature of items donated to the thrift store, it is unfeasible to assign fair market values to items received at the time of sale. While management presented its case to the auditors that this is impractical and does not warrant a qualified opinion, the auditors were unwilling to change their opinion.

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**Gay Community Center of Richmond**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

5. **FY2007 Financial Statements** – The audited cash basis FY2007 financial statements have been adjusted to reflect ending balances on an accrual basis. While the auditors did not recast the FY2007 financial statements when they prepared the FY2008 audit report, they did recast the ending net asset balance for FY2007. The amount reflected in this report equals the auditors revised net asset balance.
6. **FY2006 Ratios of Financial Health** – The FY2006 financial statements are presented on a cash basis. Accordingly, working capital and the liquidity ratio are reported as N/A because they could not be calculated on an equivalent basis as used for FY2007 and FY2008.



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**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1995	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$7,464,351	28
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

The Gay, Lesbian and Straight Education Network strives to assure that each member of every school community is valued and respected regardless of sexual orientation or gender identity/expression.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

Given the hiring of a new ED in 11/08, GLSEN has extended our previous 3-year strategic plan through FY2010, while beginning work on a new 3-year plan. Please contact Dr. Eliza Byard, GLSEN's Executive Director, (ebyard@glsen.org) with any questions about activities beyond those listed for 2010 below. GLSEN's strategic areas of focus are:

1. **Awareness** - Convince education leaders and policymakers of the urgent need to address anti-LGBT behavior and bias in our schools.
2. **Policies** - Protect students by advancing comprehensive and effective safe schools laws and policies.
3. **Leadership (Principals)** - Empower principals to make their schools safer places to learn.
4. **Leadership (Educators)** - Build the skills of educators to teach respect for all people.

One-year Key Planned Accomplishments for FY2010

**Increase Awareness of Need to Address Anti-LGBT Behavior/Bias in Schools**

1. Achieve 150 million TV/print media impressions or "hits." Increase # of Facebook fans from 35,000 to 55,000 and Twitter followers from 3000 to 6000 to GLSEN National and/or local chapters. Develop and launch monthly GLSEN e-newsletter.
2. Develop and implement the second wave of our GLSEN/Ad Council public service campaign that focuses on the harm caused by using anti-LGBT language; to be delivered online and through social networking sites.
3. Launch Student Ambassadors spokesperson program with our first ever GLSEN Youth Media Summit.
4. Begin 1st comprehensive study of LGBT high school drop-outs and 1st study of LGBT youth's internet use (how internet is both a resource and a risk for victimization).
5. Launch the first-ever research study on cyberbullying and the internet as a source of support and of possible risk for victimization for LGBT adolescence, with over 1,000 participants completing the study.
6. Complete the 2009 GLSEN National School Climate Survey, our 10th biennial survey of LGBT student experiences in K-12 schools nationally, with over 6,000 survey participants.
7. Develop 15 student leadership teams in local communities throughout the country through our Chapter network, with over 80 GLSEN student leaders participating.
8. Increase # of GSAs connected to GLSEN by 500.

**2009**

**Gay, Lesbian and Straight Education Network (GLSEN)**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Advance Safe Schools Law and Policies**

1. Lobby for federal bill requiring enumerated anti-bullying and harassment policies in schools that receive Safe and Drug-Free Schools funding.
2. Create the GLSEN Policy Tool-Kit, an easy-to-use source of policy and lobbying materials for constituents to use at the state and local level.
3. Demonstrate lack of comprehensive district-level protections for LGBT students across the country through our inventory of all 14,000+ school districts in the country.
4. Train school advocates from across the country and hold a GLSEN Lobby Day when we will have meetings with over 80 members of Congress.

**Empower Principals to Make Schools Safe Places to Learn**

1. Create and distribute easily-implemented "Safe Schools Roadmap" for school leaders.
2. Develop a series of podcasts aimed at school leaders on topics related to LGBT students, partnering with leading national education organizations.

**Build Educators' Skills to Teach Respect for All People**

1. Establish a GLSEN training of trainers programs.
  - Implement school-wide awareness-building programs
  - Advocate and engage other major school districts to implement trainings in the coming year
  - Provide K-12 educators with resources and curriculum to end bullying and harassment in their schools
  - Develop inclusive curricular resources
2. Develop a distance-learning model for educator trainings and partner with 2-3 large U.S. school districts in implementing this professional development series district-wide.
3. Launch and disseminate our revised "Safe Space Kit," a guide for educators on making their schools safe and inclusive for LGBT students.
4. Develop and launch first-ever resources for high school students related to GLSEN's No Name-Calling Week program.
5. Complete and disseminate first-ever evaluation study of educator training programs about anti-LGBT bias in schools.

Key Accomplishments in FY2009

**Awareness**

1. Created 1st-ever Ad Council campaign on LGBT issues and new site, [www.thinkb4youspeak.org](http://www.thinkb4youspeak.org). Earned 25 million-plus impressions and 160,000 unique visitors to website. Garnered over \$50 million in earned and donated media support.
2. Increased coverage of GLSEN and its programs to 80 million print and 47 million TV impressions, and 100,000+ unique website visitors per month.
3. Released 2007 National School Climate Survey, the largest study of LGBT secondary school students' experiences in school.
4. Released 1st-ever report on experiences of transgender students.
5. Released 1st comprehensive report on experiences of LGBT students of color.
6. Released a series of 15 state-specific research briefs on school climate.
7. Doubled student participation in both Ally Week and MLK Organizing weekend.
8. Piloted a new student day of action about gender issues with nearly 500 participants.
9. Provided support to over 4,000 Gay-Straight Alliances.

**Policy**

1. Provided technical support to Equality NC for passage of 1st comprehensive safe schools law in the South, the School Violence Prevention Act.
2. Met with Secretary of Education Arne Duncan and Assistant Secretary of Education for Civil Rights Russlyn Ali. Met with senior White House staff on LGBT issues and attended President's LGBT reception.
3. Got the Safe Schools Improvement Act reintroduced on May 5, 2009. GLSEN spokesperson, Sirdeaner Walker gave testimony on July 8, 2009 at a joint House subcommittee on school safety.
4. Began inventory of school district policies on bullying and harassment in all 14,500+ public school districts in US.

**Principals' Leadership.** Conducted trainings specifically for principals for the National Association of Secondary School Principals and in several school districts around the US.

**2009**

**Gay, Lesbian and Straight Education Network (GLSEN)**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

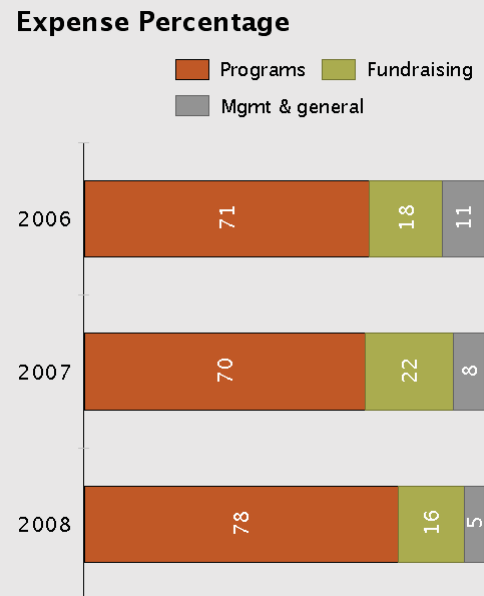
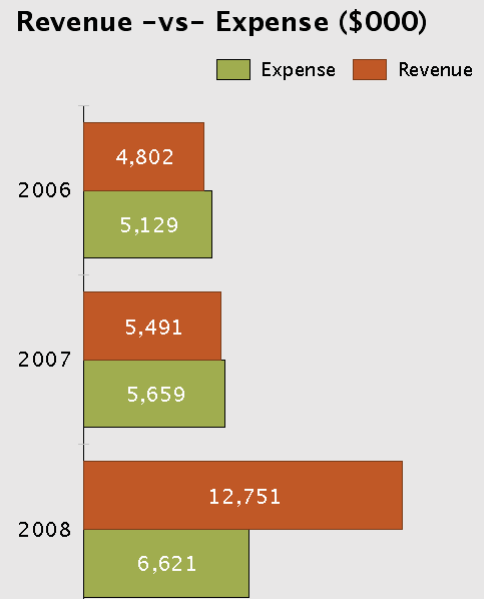
**Educators' Leadership**

1. Trained 1400+ NYC educators through Respect for All training initiative; began formal evaluation study of its impact on teacher attitudes and rates of intervention.
2. Trained 900+ educators in Rochester, NY school district.
3. Increased participation in No Name-Calling Week (led by GLSEN with 40+ national education organization partners) in elementary and middle schools. Nearly 8,000 educators registered and 1,000+ students entered associated Creative Expression Contest (using art and media to raise awareness of bullying and name-calling).

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	1.6	2.0	2.7
Days of working capital	132	99	168
Working capital (\$000)	\$1,817	\$1,520	\$2,993
Average daily cash expense (\$000)	\$13.8	\$15.3	\$17.9
Fundraising expense (cash only) to raise \$1	\$0.20	\$0.23	\$0.09
Total revenue raised through development efforts (\$000)	\$4,646	\$5,329	\$12,381
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	3,685	3,835	4,352
Number of individual donors who gave > \$1,000	300	292	458
Donor turnover (gave > \$35 in prior FY & not this FY)	37%	57%	51%
Number of individuals attending fundraising events (paid > \$100 per person)	337	707	557
Percent of total revenue from top 10 contributors	43%	40%	67%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 71,106	



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$209,732	\$904,891	\$898,224
Net cash provided (used) by operating activities	546,181	10,359	300,667
Net cash provided (used) by investing activities	148,978	-17,026	67,096
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$695,159	-\$6,667	\$367,763
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$904,891</u>	<u>\$898,224</u>	<u>\$1,265,987</u>

**2009** **Gay, Lesbian and Straight Education Network (GLSEN)** Page 5  
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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$904,891		\$898,224		\$1,265,987
Investments	171,899		284,082		75,141
Other current assets	1,434,085		943,443		2,168,805
Net fixed assets	346,775		278,023		201,930
Other long-term assets	191,560		388,500		5,122,114
<b>Total Assets</b>	<b>\$3,049,210</b>		<b>\$2,792,272</b>		<b>\$8,833,977</b>
<b>Liabilities</b>					
Current liabilities	\$659,387		\$570,678		\$482,274
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$659,387</b>		<b>\$570,678</b>		<b>\$482,274</b>
<b>Net Assets</b>					
Unrestricted	896,602		289,613		450,475
Temporarily restricted	1,458,357		1,897,117		7,866,364
Permanently restricted	34,864		34,864		34,864
<b>Total Liabilities and Net Assets</b>	<b>\$3,049,210</b>		<b>\$2,792,272</b>		<b>\$8,833,977</b>

**Statement of Activities**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$2,516,006	52%	\$2,746,125	50%	\$1,705,118	13%
Bequests	0	0%	0	0%	5,887,301	46%
Dues	0	0%	0	0%	0	0%
In-kind contributions	9,068	0%	0	0%	0	0%
Foundation contributions	990,352	21%	1,237,670	23%	2,594,856	20%
Corporate contributions/Non-event sponsorships	81,959	2%	498,986	9%	395,000	3%
Government funding	0	0%	0	0%	0	0%
Program income	17,351	0%	38,200	1%	51,253	0%
Fundraising event income	1,234,819	26%	1,003,344	18%	2,007,505	16%
Less costs of direct benefit to donors	-186,326	-4%	-156,982	-3%	-208,570	-2%
Net fundraising event income	\$1,048,493		\$846,362		\$1,798,935	
Merchandise sales (net of cost of goods sold)	50,135	1%	39,492	1%	64,511	1%
Investment income	33,112	1%	57,909	1%	28,516	0%
Other revenue	55,104	1%	26,318	0%	225,637	2%
<b>Total Revenue</b>	<b>\$4,801,580</b>		<b>\$5,491,062</b>		<b>\$12,751,127</b>	
<b>Expenses</b>						
Program services	3,585,747	70%	3,914,224	69%	5,107,279	77%
Fundraising	921,702	18%	1,225,509	22%	1,080,322	16%
Management and general	532,948	10%	437,592	8%	333,058	5%
Total cash expenses	\$5,040,397		\$5,577,325		\$6,520,659	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	89,084	2%	81,966	1%	100,359	2%
Total non-cash expenses	\$89,084		\$81,966		\$100,359	
<b>Total Expenses</b>	<b>\$5,129,481</b>		<b>\$5,659,291</b>		<b>\$6,621,018</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$327,901</b>		<b>-\$168,229</b>		<b>\$6,130,109</b>	

**2009 Gay, Lesbian and Straight Education Network (GLSEN) Standard Annual Report** Page 6  
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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
22	59%	41%	0%	Board members are asked to either give \$25,000 or secure that amount from others	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
14%	0%	82%	4%	0%	0%

Gay, Lesbian and Straight Education Network (GLSEN)  
90 Broad St., 2nd Floor  
New York, NY 10004  
212-727-0135  
www.glsen.org

Additional Locations

None

**Senior Management Profile**

Legal Names

	Lowest	Average	Highest
Tenure with the organization	0.1	3.7	7.5
Compensation	\$98,950	\$153,600	\$208,250

Gay, Lesbian and Straight Education Network - 501(c)(3)

Contact

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
28	28	0	50%	43%	7%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
11%	0%	64%	21%	4%	0%

Eliza Byard  
Executive Director  
ebyard@glSEN.org

Note: Board and staff data as of 3/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- Working Capital** - Working capital (defined as cash and cash equivalents plus investments plus other current assets minus current liabilities) is further reduced by the amount of permanently restricted net asset held as cash or investments. Accordingly, permanently restricted net assets of \$34,864 in FY2006, FY2007 and FY2008 have been removed from the investment balance in order to compute the days of working capital and the liquidity ratio presented on page 4.
- Support and Revenue** - GLSEN continues to grow its individual income category, which includes Major Donors who give at least \$1,000 per annum in non-event income. In FY2008 GLSEN saw an increase of 261% and a 285% increase since FY2006. Institutional Giving (Foundations and Corporations) is another area of significant growth for the organization, with a 72% increase as compared to the previous year.

GLSEN is committed to keeping its cost of fundraising and administrative overhead at an absolute minimum so that the majority of income can be spent on programmatic work to fulfill our mission. GLSEN benchmarks itself against the Better Business Bureau's Wise Giving Alliance guidelines (www.give.org), which set a standard that 65% or more of an organization's income should be spent on programmatic purposes. We are pleased to report that, at 78%, our programmatic expenses in FY2008 continue to exceed this standard, as they have in each year of GLSEN's existence.

**2009**

**Gay-Straight Alliance Network**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1998	California & National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$794,748	8
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Empower youth activists to fight homophobia and transphobia in schools.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Bring # of youth involved GSAs in CA to 13,000+ by increasing portion of public high schools having a GSA to 2/3rds+ and increasing # of middle schools with GSAs from 21 to 32. Increase support to GSA clubs through new interactive website, integrated database to track GSAs and students, and video trainings.
2. Provide leadership, skills-building training and support to 1,500 LGBTQ and straight ally youth over 5 years, enabling them to analyze challenges in their schools and implement effective campaigns in 250+ schools, addressing issues such as school climate/slurs/harassment, needs of transgender/gender non-conforming students, LGBTQ-inclusive curricula, inclusive and comprehensive sex-ed, and (especially in more conservative areas) basic visibility and awareness.
3. Develop a GSA alumni network of program volunteers, organizational leaders, and donors. Identify pathways for alumni to engage in broader LGBTQ and other social justice movements.
4. Engage 750 LGBTQ and straight youth over 5 years in CA policy advocacy that strengthens non-discrimination and school safety protections and ensures equal access to education regardless of sexual orientation and gender identity. Simultaneously build their lobbying skills, knowledge of policymaking processes, and civic engagement. With Equality CA, engage youth in passing LGBTQ-inclusive curriculum legislation. With Transgender Law Center, engage youth to cause CA education officials to better implement non-discrimination protections for transgender and gender non-conforming youth. Deepen relationships with non-LGBT organizations working on racial and economic justice in CA education system.
5. By 2014, train adult and youth leaders in 15 states in GSA Network's youth leadership and anti-oppression model for safe schools and fully replicate GSA Network's model in 5 states, including NM, TX, one southeastern U.S. state, and 2 other states.
6. Sustain National Association of GSA Networks as a field-building, networking opportunity for state and regional, youth and adult GSA movement leaders (currently from 26 state and regional networks), as well as a formal mechanism to foster communication between national organizations (e.g. GLSEN) and state-level GSA networks. Expand access to online and local resources for GSA students nationally.

One-year Key Planned Accomplishments for FY2010

1. Establish 60 new GSAs in CA public high schools and 4 new GSAs in CA public middle schools. Launch new website and an integrated database to track GSAs and students.
2. Provide leadership, skills-building training and support to 300 LGBTQ and straight ally youth implementing issue campaigns in 50 schools. Continue LGBTQ-inclusive curriculum campaigns in 3-4 local schools and publish new youth-developed campaign toolkit on curriculum inclusion. Provide 50+ GSA clubs with LGBTQ-themed films and curriculum guides that can be used in classrooms.

**2009**

**Gay-Straight Alliance Network**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. Pilot a GSA alumni engagement program where LGBTQ and straight ally alumni participate in GSA Network as program volunteers, organizational leaders, and/or donors.
4. Through GSA Advocacy & Youth Leadership Academy and Queer Youth Advocacy Day, engage 80 LGBT and straight ally youth in policy advocacy, building their lobbying skills, knowledge of policymaking processes, and civic engagement. With Equality CA, engage youth to advocate for passage of SB 543, "Mental Health Services for At-Risk Youth," and SB 572, "Harvey Milk Day." With Transgender Law Center, engage youth in pressing CA Department of Education and CA School Boards Association to provide school districts with stronger guidance and model policies protecting transgender and gender non-conforming youth from discrimination. Increase GSA Network's participation in Campaign for Quality Education, a coalition working for economic and racial justice in CA schools.
5. Train adult and youth leaders in 10+ states in GSA Network's youth leadership model for safe schools. Continue support to GSA Network replication sites in NM and TX, and support new site(s) in 1 more state.
6. Convene 25+ regional- or state-based organizations in National Association of GSA Networks field-building and networking opportunities. Build new relationships with organizations in the southeastern US.

Key Accomplishments in FY2009

1. Helped establish 60 new GSAs in CA high schools and 5 in CA middle schools.
2. Provided leadership and skills-building training to 397 LGBTQ and straight ally youth on how to run a GSA club and engage in grassroots organizing.
3. Helped students and teachers at 50+ schools launch campaigns on changing school climate, stopping harassment, protecting transgender/gender non-conforming youth, LGBTQ-inclusive curriculum, and inclusive sexual health education. With Frameline, provided 246 GSA clubs with LGBTQ-themed films and curriculum guides; about 20% of clubs showed films in classrooms, reaching 7,500 youth.
4. Distributed 5 campaign guides for student activists on implementation of CA school nondiscrimination law; fighting slurs and verbal harassment; protections for transgender and gender non-conforming youth; LGBTQ-inclusive curriculum; and raising visibility and awareness of LGBTQ people at school. Piloted LGBTQ-inclusive curriculum campaigns in several schools and began development of extensive new campaign toolkit on curriculum inclusion.
5. Trained 75 youth at Queer Youth Advocacy Day in legislative lobbying and civic engagement. Convened GSA Advocacy and Youth Leadership Academy for 80 youth who pressed the CA Department of Education and CA School Boards Association to provide school districts with stronger guidance and model policies protecting transgender and gender non-conforming youth from discrimination.
6. GSA Network-sponsored bill, AB 3105, "Foster Youth School Safety Education Act" was signed into law. With Equality CA and CA chapter of National Association of Social Workers, engaged youth in advocating for passage of SB 543, "Mental Health Access for At-Risk Youth," and SB 572, "Harvey Milk Day." With Equality CA, Lambda Legal, NCLR and TLC, successfully defended Student Civil Rights Act, SB 777, from court challenge. Joined Campaign for Quality Education and advocated for passage of AB 8 addressing school finance.
7. Trained adult and youth leaders in 13 states on youth leadership models for GSA organizing. Continued to support replication of GSA Network's model in NM and TX.
8. Convened National Association of GSA Networks, facilitated monthly conference calls, and conducted 4-day in-person gathering of 70 youth and adult activists from 13 state GSA networks.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

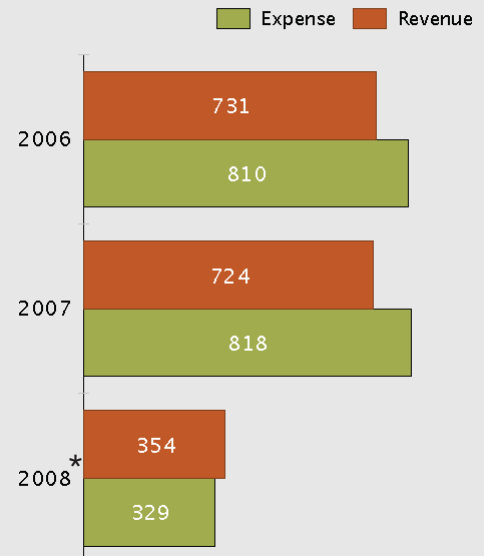
Ratios of Financial Health

	2006	2007	2008*
Liquidity ratio	9.3	N/A	4.4
Days of working capital	86	45	70
Working capital (\$000)	\$191	\$100	\$126
Average daily cash expense (\$000)	\$2.2	\$2.2	\$1.8
Fundraising expense (cash only) to raise \$1	\$0.11	\$0.11	\$0.08
Total revenue raised through development efforts (\$000)	\$731	\$724	\$349*

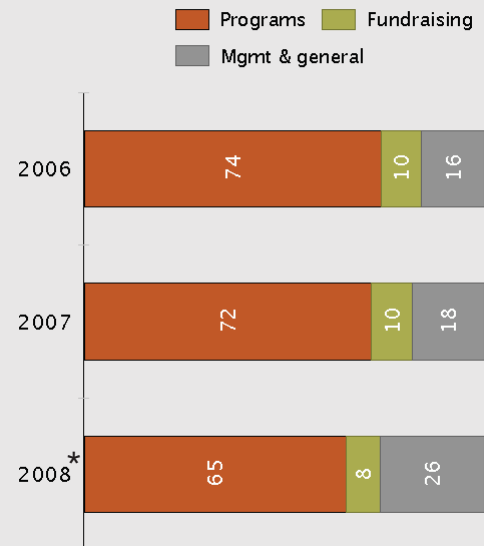
Indicators of Contributor Base

Number of individual donors who gave > \$35	240	270	97*
Number of individual donors who gave > \$1,000	12	17	7*
Donor turnover (gave > \$35 in prior FY & not this FY)	73%	55%	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	32	76	0*
Percent of total revenue from top 10 contributors	78%	72%	84%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 6,303	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Unaudited</u> <u>2006</u>	<u>Unaudited</u> <u>2007</u>	<u>Reviewed</u> <u>2008*</u>
Cash and cash equivalent balance at beginning of year	\$290,727	\$213,134	\$99,522
Net cash provided (used) by operating activities	-72,568	-111,862	28,956
Net cash provided (used) by investing activities	-5,025	-1,750	0
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>-\$77,593</u>	<u>-\$113,612</u>	<u>\$28,956</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$213,134</u>	<u>\$99,522</u>	<u>\$128,478</u>

\*Due to change in fiscal year, data reported for a short 6 month fiscal year (1/1/08 - 6/30/08), see notes and advisories.

**2009**

# Gay-Straight Alliance Network

## Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

	Unaudited 2006	Unaudited 2007	Reviewed 2008*
<b>Assets</b>			
Cash and cash equivalents	\$213,134	\$99,522	\$128,478
Investments	0	0	0
Other current assets	729	0	26,950
Net fixed assets	6,868	4,719	2,847
Other long-term assets	6,458	6,458	6,696
<b>Total Assets</b>	<b>\$227,189</b>	<b>\$110,699</b>	<b>\$164,971</b>
<b>Liabilities</b>			
Current liabilities	\$23,035	\$0	\$29,323
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$23,035</b>	<b>\$0</b>	<b>\$29,323</b>
<b>Net Assets</b>			
Unrestricted	204,154	110,699	35,760
Temporarily restricted	0	0	99,888
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$227,189</b>	<b>\$110,699</b>	<b>\$164,971</b>

### Statement of Activities

	Unaudited 2006		Unaudited 2007		Reviewed 2008*	
<b>Support &amp; Revenue</b>						
Individual contributions	\$66,551	9%	\$112,406	16%	\$44,738	13%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	400	0%	0	0%
Foundation contributions	577,140	79%	544,500	75%	276,000	78%
Corporate contributions/Non-event sponsorships	18,930	3%	5,817	1%	6,560	2%
Government funding	0	0%	0	0%	0	0%
Program income	67,888	9%	61,156	8%	22,095	6%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	0	0%	0	0%	4,107	1%
<b>Total Revenue</b>	<b>\$730,509</b>		<b>\$724,279</b>		<b>\$353,500</b>	
<b>Expenses</b>						
Program services	597,147	74%	582,880	71%	215,050	65%
Fundraising	80,787	10%	82,773	10%	27,772	8%
Management and general	128,879	16%	147,783	18%	83,857	26%
Total cash expenses	\$806,813		\$813,436		\$326,679	
Non-cash expenses						
In-kind	0	0%	400	0%	0	0%
Depreciation	3,526	0%	3,898	0%	1,872	1%
Total non-cash expenses	\$3,526		\$4,298		\$1,872	
<b>Total Expenses</b>	<b>\$810,339</b>		<b>\$817,734</b>		<b>\$328,551</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$79,830</b>		<b>-\$93,455</b>		<b>\$24,949</b>	

\*Due to change in fiscal year, data reported for a short 6 month fiscal year (1/1/08 - 6/30/08), see notes and advisories.

2009

## Gay-Straight Alliance Network Standard Annual Report

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Board Members

### Locations & Contact

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
18	61%	39%	11%	Each board member is asked to make a contribution that is personally significant to them. Adult board members have a give/get requirement of \$2,000; youth board members are encouraged to set a give/get goal and are given many opportunities to participate in fundraising activities.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	17%	44%	50%	0%	0%

Gay-Straight Alliance Network  
1550 Bryant St., Suite 800  
San Francisco, CA 94103  
415-552-4229  
www.gsanetwork.org

Additional Locations

Los Angeles  
Fresno

Legal Names

Gay-Straight Alliance Network - 501(c)(3)

Contact

Carolyn Laub  
Executive Director  
carolyn@gsanetwork.org

### Senior Management Profile

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.8	4.5	11.5
Compensation	\$41,208	\$62,115	\$90,597

### Paid Staff

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
8	7	1	50%	50%	25%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
12%	12%	62%	25%	0%	0%

*Note: Board and staff data as of 8/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

### Organization's Notes and Advisories

1. **FY2008 Short Fiscal Year** - Upon separating from its fiscal sponsor, whose fiscal year ran from Jan 1-Dec 31, GSA Network changed its fiscal year to Jul 1-Jun 30 in order to align its programmatic activities more closely with the school year cycle. To implement this change, GSA Network had to report a short fiscal year for the six month period Jan 1, 2008-Jun 30, 2008. Accordingly, please keep this in mind when comparing FY2008's half year results with the full year results reported for FY2006 and FY2007.
2. **Indicators of Contributor Base** - Due to the short fiscal year reported for FY2008, the numbers reported as indicators of contributor base are not directly comparable to FY2007 or FY2006.
3. **Board Diversity** - GSA Network's board is a youth-adult partnership board, which reflects our commitment to youth leadership development. Ten of the 18 members of our board are youth constituents in the organization, ages 19 and under.



*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1976	Colorado
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,734,238	20
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

To engage, empower, enrich and advance the GLBT community of Colorado.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

Based on The Center's new 3-year strategic plan (2009-2011):

- Become the preeminent LGBT organization in the Rocky Mountain region.** Develop and mobilize a strong regional LGBT network, increase The Center's visibility and brand image, and establish The Center as a resource for other LGBT organizations.
- Promote the Center's long-term sustainability.** Develop multiple strategies to ensure financial sustainability while enhancing capacity to adapt to change, address challenges and take advantage of opportunities.
- Develop exceptional, state-of-the-art virtual and physical spaces.** Launch new online presence that includes new website and online tools to promote the LGBT community's inclusivity and connection.
- Expand and enhance programs' relevance, quality, access and visibility.** Build, sustain and strengthen community-driven and responsive programming to support healthy human development, from youth to elders, and pursue full legal and civil equality for LGBT and HIV+ people.
- Assess and strengthen The Center's organizational effectiveness.** Develop strategies to continuously measure and assess impact and effectiveness in the community, and for continuous improvement of programs, services and stakeholder relationships. Build capacities across the organization, including:
  - Board development to strategically lead and govern The Center as a regional hub for GLBT issues;
  - Staff/leadership development to design and build strong programs and networks;
  - Community/program inclusiveness that builds a sense of community (includes adding elder and family program areas and more social and cultural programming);
  - Donor value/new fundraising initiatives that increase financial resources by connecting donors to The Center and enhance commitment to philanthropy in the GLBT community; and,
  - Stronger statewide network of GLBT Centers and allies to expand and strengthen the GLBT agenda.

One-year Key Planned Accomplishments for FY2009

- Leadership:** Initiate new governance structure and recruit diverse, talented Board to enable leadership that keeps The Center relevant and furthers mission and new strategic plan. Build network of LGBT centers and allies and develop strategies for connecting with business, education, government and nonprofit and LGBT nonprofit sectors, as well as outreach to communities of color.
- Sustainability:** Build a strong legacy gift program and expand strategies to increase donor attraction and retention.
- Exceptional virtual and physical space:** Initiate capital campaign and explore purchase of permanent, accessible and welcoming space to accommodate growth.
- Enhanced programs:** Develop new programs led by and for LGBT families and by, for, and inclusive of LGBT people of color; and infuse wellness messaging into youth programming outreach and events.
- Organizational effectiveness:** Build leadership team and staff capacity to accomplish above; develop tools to evaluate and provide feedback on programs, communications and progress on strategic plan.

**2009**

**The GLBT Community Center of Colorado**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2008

1. Developed new organizational structure to align with new vision and strategic directions.
2. Consolidated many programs under umbrella of Community Programs, which allows programming across departments and enhances efficiency.
3. Logged 6,000 volunteer hours that gave life to and made The Center's work possible.
4. Recorded highest-ever PrideFest attendance: 250,000, among the largest in US.
5. With Equal Rights Colorado, achieved passage of Senate Bill 200, which expands SO and GI protections throughout CO Law (e.g., in public accommodations, housing, schools).
6. Logged 6,929 youth visits to Rainbow Alley, where youth gather, discover themselves and develop leadership skills.
7. Revamped and increased staff in Development and Communications to launch new branding campaign that includes new website, logo, staff training, and enhanced public and community communications.
8. Developed infrastructure to serve GLBT elders; became SAGE affiliate.
9. Began process to enhance governance structure's effectiveness and efficiency.
10. Hired a new ED to provide vision and take the organization to new levels in operations, community engagement, and leadership on LGBT issues in the Rocky Mountain region.

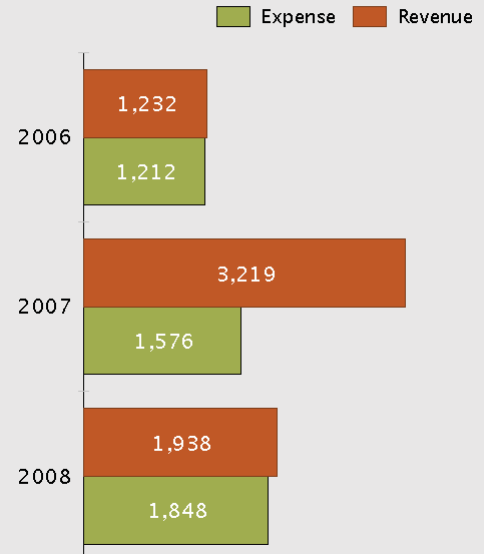
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

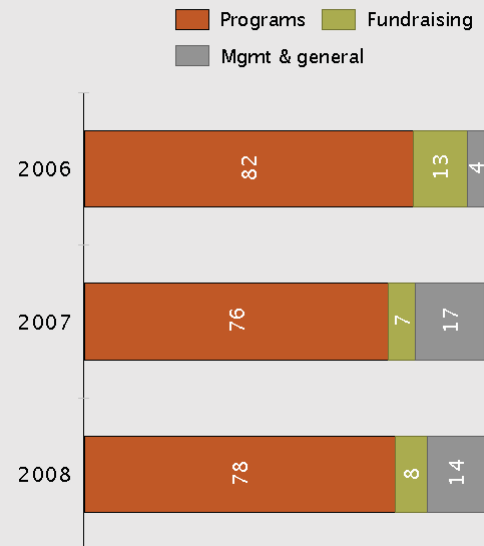
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	1.0	1.9	0.8
Days of working capital	26	166	109
Working capital (\$000)	\$84	\$711	\$477
Average daily cash expense (\$000)	\$3.3	\$4.3	\$4.4
Fundraising expense (cash only) to raise \$1	\$0.18	\$0.11	\$0.10
Total revenue raised through development efforts (\$000)	\$885	\$1,024	\$1,388
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	510	482	403
Number of individual donors who gave > \$1,000	111	102	46
Donor turnover (gave > \$35 in prior FY & not this FY)	43%	49%	51%
Number of individuals attending fundraising events (paid > \$100 per person)	80	126	281
Percent of total revenue from top 10 contributors	38%	59%	38%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 5,805	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$100,052	\$127,858	\$62,877
Net cash provided (used) by operating activities	28,359	1,164,159	128,493
Net cash provided (used) by investing activities	-553	-1,227,324	-101,806
Net cash provided (used) by financing activities	0	-1,816	-2,165
Net increase (decrease) in cash	\$27,806	-\$64,981	\$24,522
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$127,858</u>	<u>\$62,877</u>	<u>\$87,399</u>

**2009**

**The GLBT Community Center of Colorado**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<b>Assets</b>					
Cash and cash equivalents	\$127,858		\$62,877		\$87,399
Investments	0		203,341		0
Other current assets	89,471		585,800		493,687
Net fixed assets	35,045		21,702		13,381
Other long-term assets	0		1,034,049		1,339,214
<b>Total Assets</b>	<b>\$252,374</b>		<b>\$1,907,769</b>		<b>\$1,933,681</b>
<b>Liabilities</b>					
Current liabilities	\$133,555		\$141,469		\$104,006
Long-term debt	0		0		0
Other long-term liabilities	0		4,099		1,718
<b>Total Liabilities</b>	<b>\$133,555</b>		<b>\$145,568</b>		<b>\$105,724</b>
<b>Net Assets</b>					
Unrestricted	83,774		86,652		1,375,587
Temporarily restricted	35,045		1,675,549		152,370
Permanently restricted	0		0		300,000
<b>Total Liabilities and Net Assets</b>	<b>\$252,374</b>		<b>\$1,907,769</b>		<b>\$1,933,681</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$185,071	15%	\$227,678	7%	\$195,352	10%
Bequests	0	0%	1,227,179	38%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	238,477	12%
Foundation contributions	158,700	13%	186,500	6%	347,000	18%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	27,745	1%
Government funding	344,571	28%	937,771	29%	552,047	28%
Program income	410,769	33%	518,807	16%	444,002	23%
Fundraising event income	127,273	10%	81,389	3%	98,107	5%
Less costs of direct benefit to donors	0	0%	0	0%	-17,661	-1%
Net fundraising event income	\$127,273		\$81,389		\$80,446	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	27,373	1%	35,805	2%
Other revenue	5,350	0%	12,211	0%	17,334	1%
<b>Total Revenue</b>	<b>\$1,231,734</b>		<b>\$3,218,908</b>		<b>\$1,938,208</b>	
<b>Expenses</b>						
Program services	981,882	81%	1,189,046	75%	1,288,022	70%
Fundraising	162,023	13%	110,023	7%	139,809	8%
Management and general	51,082	4%	262,065	17%	173,345	9%
Total cash expenses	\$1,194,987		\$1,561,134		\$1,601,176	
Non-cash expenses						
In-kind	0	0%	0	0%	238,477	13%
Depreciation	17,421	1%	14,392	1%	8,321	0%
Total non-cash expenses	\$17,421		\$14,392		\$246,798	
<b>Total Expenses</b>	<b>\$1,212,408</b>		<b>\$1,575,526</b>		<b>\$1,847,974</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$19,326</b>		<b>\$1,643,382</b>		<b>\$90,234</b>	

**2009**

**The GLBT Community Center of Colorado**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
11	36%	64%	0%	\$1,200 give or get	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	100%	0%	0%	0%

The GLBT Community Center of Colorado  
 PO Box 9798  
 Denver, CO 80209  
 303-733-7743  
 www.glbtcOLORADO.org

Additional Locations

**Senior Management Profile**

None

Legal Names

The Gay, Lesbian, Bisexual and Transgender Community Center of Colorado - 501(c)(3)

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.3	4.4	5.7
Compensation	\$50,000	\$65,125	\$90,000

**Paid Staff**

Contact

Carlos Martinez  
 Executive Director  
 cmartinez@glbtcOLORADO.org

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
20	14	6	35%	65%	5%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	90%	10%	0%	0%

*Note: Board and staff data as of 5/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Organization Overview** - With a budget of \$1.7 million, the Center now maintains programs in youth services, health and wellness, social and support groups, and cultural events. Each June, The Center produces PrideFest which draws upwards of 250,000 people to Denver's Civic Center Park to commemorate the GLBT civil rights movement. More specifically, current programs include:
  - Youth Services: Rainbow Alley (drop-in center); Speakers Bureau, training to CBOs; and, social events
  - Legal and Advocacy: Legal hotline; legal counseling, advocacy and limited legal representation
  - Community Programs: Health awareness programs; statewide GLBT health network; SmokeFreeGLBT; Elders programs
  - Community Events: PrideFest; Jokers, Jewels and Justice; QueerProm; Gaybutante
  - David Bohnett Cyber Center
  - Terry Mangan Memorial Library
  - Speakers Bureau and GLBT Sensitivity Training
  - GLBT Social and Support Groups.
- Board Designated Funds** - The Center received an unrestricted bequest in 2007 that the Board designated as a reserve fund to be used at their discretion. As of 12/31/08 the balance was \$1,027,179 and is included in Unrestricted Net Assets. For additional information please contact The Center or visit our website at www.glbtcOLORADO.org.

For additional information please contact The Center or visit our website at www.glbtcOLORADO.org.



**2009**

**GroundSpark**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1978	International
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Arts/media
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,167,600	7
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Create visionary films and accompanying dynamic educational campaigns that move individuals and communities to take action for a more just world. Our primary program, the Respect For All Project (RFAP), promotes the development of safe, inclusive schools and communities that are free from bias and prejudice.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Develop *Straightlaced* educational curriculum and peer-to-peer training to help viewers of the film understand how homophobia and anti-female attitudes fuel gender bias.
2. Launch national outreach campaign around *Straightlaced* to cause as many high school students as possible engage with film and structured follow-up. Conduct high-profile national media campaign showing anti-gay prejudice as fuel for gender pressures.
3. Through national safe schools movement, develop "rapid response" team that uses best strengths of each major organization to support school district officials who come under attack for implementing gay-inclusive policies or curricula.
4. Lead shaping of national conversation about impact on young people of gender bias, bullying, family diversity, and homophobia and intersections of those issues with biases based on race, ethnicity, religion and economic or immigrant status.
5. Update and strengthen GroundSpark's culture-changing films, curricula and professional development programs. Develop new film and media campaigns, including selection of new anti-bias issue for RFAP media work. Begin developing film and designing campaign structure, partnerships, and collateral materials.
6. Use new media platforms to increase breadth of reach and interactive nature of GroundSpark programs. Transition to digital delivery systems that enable educational institutions to download or stream RFAP programming and professional development.
7. Deliver message, workproducts and services to broader national range of communities and institutions, including 20 geographically-spread, conservative or faith-based communities. Stimulate use of RFAP gay-inclusive films and curricula on family diversity and bullying in conservative areas.

One-year Key Planned Accomplishments for FY2009

1. Launch *Straightlaced—How Gender's Got Us All Tied Up*, GroundSpark's newest documentary about the pressures teens face when it comes to gender-based expectations and sexuality. Hold premiere benefits in SF, LA, Boston, and NYC, with another planned for Minneapolis. Produce over 30 community-based screenings in partnership with local LGBT, youth advocacy and education organizations. Organize day-long summits of *Straightlaced* organizational partners in DC and SF to strategize on how they might best use the film and conduct outreach/marketing with GroundSpark.
2. Produce first *Straightlaced* DVD with Spanish subtitles, closed captioning, and producers' interview. (Will issue 2nd educational version in 2010).
3. Continue to deliver RFAP professional development and community workshops with *That's a Family*, *Let's Get Real*, *It's Elementary* and *It's STILL Elementary*. Present *Straightlaced* at many national conferences and to bring these resources into conservative and underserved communities. Actively reach out to professionals who may not have been previously exposed to anti-bullying media and education tools that include LGBT issues, including those in the fields of domestic violence, education reform, and adolescent sexuality.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

4. Organize and convene a national "Rapid Response Network" of 30 national organizations that can provide strategic and timely support when school districts come under attack for adopting LGBT-inclusive curriculum or policies.

Key Accomplishments in FY2008

1. Completed filming and production of *Straightlaced*, our 4th RFAP film, with late addition of a range of teens with more diverse experiences of pressure to conform to gender norms, based on feedback at rough-cut screenings and from campaign partners. Advance screenings received rave reviews from educators, students, activists, community leaders and organizations. The Anti-Defamation League signed on to use it in an extensive anti-bias education program.
2. RFAP moved into more conservative and hard-to-reach communities across the US and added as outreach partners Girls, Inc. and American School Counselors Association. RFAP continued serving on CA Safe Schools Coalition and National Safe Schools Roundtable (NSSR) steering committees. With NSSR, led initiative to create national online searchable database of safe schools organizations.
3. Working with 3 CA school districts, conducted research, planning and development of Community Outreach Initiative (COI), a pilot community organizing and training program to build long-term capacity, strengthen safe schools efforts, and advocate for diversity and anti-violence programs for school-aged youth in CA. The pressing need for safer schools was made painfully clear by the shooting of Lawrence King in Oxnard, CA. King, an openly gay 15 year-old, was the victim of a deadly hate crime perpetrated by a fellow student. GroundSpark took the lead in speaking to the media about the shooting, and is serving as a national resource to communities seeking to stop such tragedies from happening in their school. We will also be working with Oxnard School District as one of the three COI pilot districts.
4. Re-released *It's Elementary* for that film's 10th Anniversary. Created *It's STILL Elementary*, a 50-minute documentary about making the original film, its enormous impact, conservative attacks on it, and the continuing necessity for training teachers to talk with students about homophobia. Conducted world premiere at Columbia University in partnership with HRC. Followed with a safe schools symposium moderated by CNN producer Rose Arce. Debra Chasnoff took *It's STILL Elementary* on 3-city tour of AL and TN, the 1st major Deep South tour of an RFAP film. *It's STILL Elementary* won the Spring 2008 CINE Golden Eagle Award.

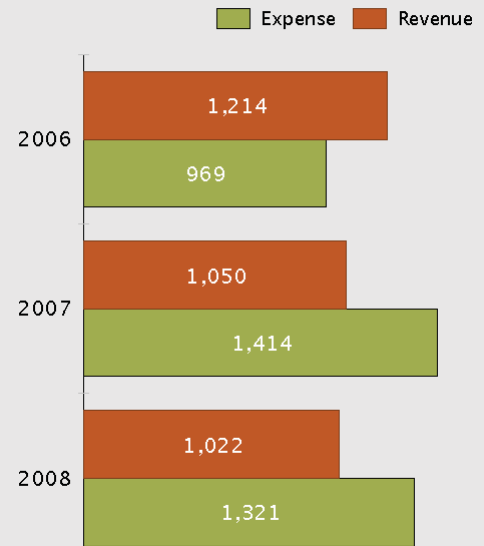
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

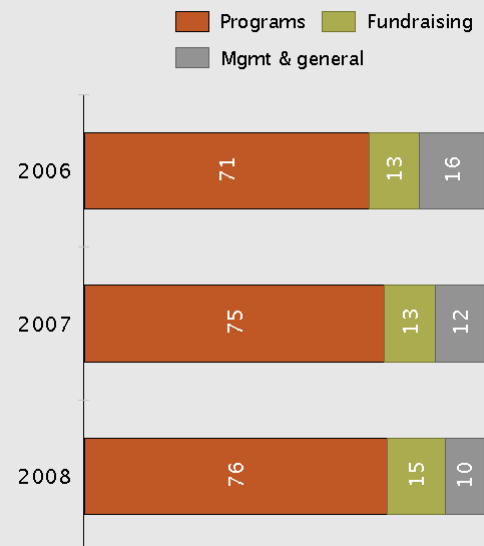
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	14.1	2.7	1.0
Days of working capital	288	102	24
Working capital (\$000)	\$755	\$392	\$85
Average daily cash expense (\$000)	\$2.6	\$3.9	\$3.6
Fundraising expense (cash only) to raise \$1	\$0.12	\$0.22	\$0.24
Total revenue raised through development efforts (\$000)	\$963	\$796	\$816
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	321	425	456
Number of individual donors who gave > \$1,000	55	79	90
Donor turnover (gave > \$35 in prior FY & not this FY)	61%	49%	49%
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	N/A
Percent of total revenue from top 10 contributors	49%	64%	69%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 37,399	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$291,217	\$395,511	\$366,599
Net cash provided (used) by operating activities	107,405	-134,217	-314,915
Net cash provided (used) by investing activities	-3,111	105,305	-11,198
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$104,294	-\$28,912	-\$326,113
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$395,511</u>	<u>\$366,599</u>	<u>\$40,486</u>

**2009**

## GroundSpark

### Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

<u>Assets</u>	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalents	\$395,511	\$366,599	\$40,486
Investments	101,573	13	0
Other current assets	293,590	160,521	86,432
Net fixed assets	11,653	10,775	17,243
Other long-term assets	805	805	2,500
<b>Total Assets</b>	<b>\$803,132</b>	<b>\$538,713</b>	<b>\$146,661</b>
<u>Liabilities</u>			
Current liabilities	\$35,192	\$134,685	\$42,122
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
Total Liabilities	\$35,192	\$134,685	\$42,122
<u>Net Assets</u>			
Unrestricted	262,000	163,123	-103,916
Temporarily restricted	505,940	240,905	208,455
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$803,132</b>	<b>\$538,713</b>	<b>\$146,661</b>

### Statement of Activities

<u>Support &amp; Revenue</u>	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>	
Individual contributions	\$269,264	22%	\$326,142	31%	\$76,693	8%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	673,540	55%	460,002	44%	686,680	67%
Corporate contributions/Non-event sponsorships	20,325	2%	9,450	1%	275	0%
Government funding	0	0%	0	0%	0	0%
Program income	235,529	19%	235,331	22%	201,014	20%
Fundraising event income	0	0%	0	0%	80,494	8%
Less costs of direct benefit to donors	0	0%	0	0%	-27,722	-3%
Net fundraising event income	\$0		\$0		\$52,772	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	15,781	1%	18,862	2%	4,565	0%
Total Revenue	<b>\$1,214,439</b>		<b>\$1,049,787</b>		<b>\$1,021,999</b>	
<u>Expenses</u>						
Program services	679,673	70%	1,053,137	74%	994,613	75%
Fundraising	120,107	12%	178,552	13%	193,620	15%
Management and general	156,103	16%	175,706	12%	128,512	10%
Total cash expenses	\$955,883		\$1,407,395		\$1,316,745	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	13,218	1%	6,304	0%	4,743	0%
Total non-cash expenses	\$13,218		\$6,304		\$4,743	
Total Expenses	<b>\$969,101</b>		<b>\$1,413,699</b>		<b>\$1,321,488</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$245,338</b>		<b>-\$363,912</b>		<b>-\$299,489</b>	

2009

**GroundSpark**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
11	27%	73%	0%	There is no fundraising requirement for board members, but 100% participation in our yearly fundraising efforts is encouraged.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
27%	9%	55%	9%	0%	0%

**Locations & Contact**

GroundSpark  
2180 Bryant St., Suite 203  
San Francisco, CA 94110  
415-641-4616  
www.groundspark.org

Additional Locations

San Francisco

Legal Names

GroundSpark - 501(c)(3)

Contact

Debra Chasnoff  
Executive Director  
dchnsnoff@groundspark.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.2	5.6	19.0
Compensation	\$46,800	\$66,133	\$102,759

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
7	6	1	0%	100%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	43%	43%	14%	0%	0%

Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- Organization History** - The organization was founded as Women's Educational Media in 1978. We began our operations in 1982, when our current executive director inherited the organization from the original director. Women's Educational Media hired its 1st salaried employee in 1990. The organization changed its name to GroundSpark in 2007.
- Fundraising Events** - We typically only hold fundraising events where admission is charged when we premiere a new film, typically every 3 or 4 years. In the last 3 years, we have not premiered a film, but in 2009 we will premiere our latest film, *Straightlaced*. Outreach for *Straightlaced* and the 2009 premieres began in 2008 resulting in 2008 fundraising events income. In addition to film premieres, GroundSpark supporters hold private parties where new GroundSpark donors are cultivated and donations are received. Revenue from those events shows up under individual donor contributions and typically the hosts absorb the cost of the events.
- Net Assets** - GroundSpark's Net Assets have decreased from year to year. This is due to income not growing at the same pace as our expenses. Expenses increased since 2006 as we continued production of our latest film, grew our communications and marketing efforts, and increased staff. GroundSpark has since implemented a more conservative financial plan, and decreased costs in 2009 and 2010, as a move toward greater financial stability.
- Individual Donor Revenue Growth** - We have made a concerted effort through new stewardship initiatives to expand the % of revenue derived from donations from individuals and family foundations. In FY2007 we began a more focused effort to retain donors and to reach out to lapsed donors.



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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1980	National
<i>Fiscal Year</i>	<i>Type</i>
Apr - Mar	Advocacy
<i>2010 Budget</i>	<i>Total Paid Staff</i>
\$37,270,000	150
<i>Tax Status*</i>	
501(c)(3)	20%
501(c)(4)	80%

\* Percent of latest FY revenue.

**Mission**

Achieve LGBT equality by inspiring and engaging all Americans. As America's largest LGBT civil rights organization, the Human Rights Campaign (HRC) strives to end discrimination against LGBT citizens and realize a nation that achieves fundamental fairness and equality for all.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Secure equal rights for LGBT individuals and families through aggressive, strategic engagement in the realms of politics and advocacy.
2. Build broad, strong support among all Americans for LGBT equality, recognizing that every American, regardless of background, sexual orientation, gender identity or expression, is a stakeholder in this cause.
3. Enhance the day-to-day lives of LGBT individuals and families by providing resources, outreach and education about the laws and policies affecting our lives at home, at work and in the community.
4. Develop effective messages and communication tools to educate and engage the LGBT community and the American public in ways that rapidly expand dialogue around these issues.
5. Secure a vibrant future for the LGBT community by further strengthening the financial, volunteer, membership and professional capacity of HRC as it works to continue to be a leading force in achieving equality; grow, educate, and engage our diverse membership of more than 750,000.

One-year Key Planned Accomplishments for FY2010

**Federal Legislative Advocacy**

1. Introduce fully inclusive Employment Non-Discrimination Act (ENDA) in US House and Senate; build co-sponsors and secure House floor action once vote count is sufficient.
2. Reintroduce Matthew Shepard Local Law Enforcement Hate Crimes Prevention Act in US House and Senate, secure floor votes in both chambers, and enact into law.
3. Secure hearings on Domestic Partnership Benefits and Obligations Act (DPBO) and Tax Equity for Health Plan Beneficiaries Act (DP Tax).
4. Secure inclusion of protections and benefits for LBGT families in health reform legislation.
5. Work with the Obama administration to implement executive branch recommendations in HRC's "Blueprint for Positive Change."
6. Determine best strategy for securing repeal of "Don't Ask, Don't Tell" (DADT) and lobby White House to end discharges and undertake strategy for full legislative repeal.
7. Defeat any efforts to repeal DC law recognizing marriages performed in other states.
8. Introduce federal legislation highlighting discrimination against LGBT community in all facets of American life.
9. Expand outreach to members of Congress by faith leader who support equality.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

10. Expand outreach to organized labor and Latino/a and African-American communities.
11. Secure adequate funding for HIV/AIDS programs in reauthorizations of Ryan White CARE Act and Labor-HHS-Education, Transportation-HUD and Foreign Operations appropriations bills. Lift ban on use of federal funds for syringe-exchange programs in Labor-HHS appropriations bill.

**Grassroots Organizing**

1. Elect fair-minded candidates in 2009 VA, NJ, NY and OH state assembly and governor's races.
2. Build support for repeal of CA Prop 8 by engaging HRC members/supporters and communities of faith.
3. Work on ballot measures, legislation, relationship recognition, and non-discrimination bills in MD, DE, OH, HI, ME, NH, NJ, NY and VT. Help IA statewide LGBT group defend marriage equality against a possible amendment in legislature.

**Education, Advocacy and Research**

1. Bring 250+ clergy members to DC for Clergy Call for Justice and Equality to lobby Congress for hate crimes legislation and fully inclusive ENDA.
2. Form strategic partnership with CA Faith for Equality (CFE) to educate and mobilize CA's faith communities on LGBT equality.
3. Expand *Healthcare Equality Index (HEI)* to include all types of healthcare facilities, e.g., hospitals, clinics, nursing homes, hospices and home healthcare.
4. Expand All Children-All Families adoption recruitment campaign.
5. Begin strategic marketing/outreach for Welcoming Schools program by creating and distributing brochure and CD-ROM at conferences of National Association of Elementary School Principals, National Education Association and Association for Supervision and Curriculum Development. Hold 1st Training of Trainers (TOT).
6. Partner with Trevor Project to produce *Resource Guide to Coming Out for Teens*.
7. With partners, hold 1st Welcoming Community College Initiative, convening experts and key stakeholders to develop a multi-phase, multi-year initiative.
8. Prepare businesses for *Corporate Equality Index (CEI) 3.0*, and develop new resource on health insurance for transgender employees.
9. Finish development and begin marketing corporate climate resources, groundbreaking tools to improve corporate climate for LGBT employees.

**Outreach to Diverse Communities in LGBT Movement**

1. Organize 8 to 12 HRC local Steering Committees to identify 1 million new Latino voters in 2009-2010, with major Latino/a and labor partners.
2. Apply Equality Forward research results about LGBT people of color by developing a toolkit for employers for facilitating dialogue between LGBT and straight people of color (POC).
3. Organize volunteers to put on educational and informational activities for LGBT POC and transgender people on job-preparedness and how to come out in one's place of worship.
4. Issue *Transgender Visibility: A Guide to Being You* and develop "bill of rights" for transgender children and families as springboard to future HRC/coalition work.
5. Build relationships with unions and Latino/a organizations in conjunction with the CA Faith for Equality collaboration.
6. Develop communications and marketing strategies for Spanish-speaking audiences.
7. Host 2nd HRC Women & Leadership learning retreat with 24 participants.

**HRC PAC Support of Federal and Gubernatorial Candidates**

1. Defeat anti-LGBT incumbents by supporting viable LGBT-friendly challengers.
2. Expand # of incumbents and candidates receiving HRC endorsements and financial support in 2010 election. Raise early funds for incumbents to enable election-year focus on open and challenger races.

**Communications and Outreach**

1. Build new relationships with White House communications staff and reporters.
2. Infuse *Equality* magazine, reports and brochures with fresh content and design.
3. Complete online searchable archive and database on HRC's visible history, allowing better retelling of community's emotional stories.
4. Make HRC media available more broadly and engage supporters through new online video platforms, social networking sites and blogs.

**Online Communications for Development**

1. Develop high-profile viral campaign using social networking sites, blogs, and the latest online game and video technologies for list growth, education, and engagement.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

**Federal Legislative Lobbying**

1. US House passed Local Law Enforcement Hate Crimes Prevention Act 237-180 (died in House-Senate conference)
2. Congress introduced 1st gender identity-inclusive Employment Non-Discrimination Act (ENDA). Sexual orientation-only ENDA passed House (235 to 184), 1st time ENDA has cleared either Chamber of Congress.
3. House introduced Military Readiness Enhancement Act to repeal DADT with record 141 co-sponsors. HRC garnered extensive media coverage with Legacy of Service Tour by gay and lesbian service members and coordinated 14th anniversary "commemoration" of DADT involving 12,000 American flags placed on National Mall.
4. House subcommittee held 1st-ever Congressional hearing on transgender employment discrimination with 2 HRC-sponsored witnesses.
5. With SLDN, stimulated 1st House hearing on lesbian and gay service members since enactment of DADT. HRC worked with SLDN and committee staff to recommend witnesses and prepare testimony and briefing materials.
6. Senate committee held 1st-ever Congressional hearing on domestic partner benefits. HRC provided background information/visual aids on corporations' equitable policies.
7. With allies and coalition partners, secured statutory repeal of decades-old travel ban barring HIV+ individuals from entering US.

**State Legislative Lobbying**

1. Assigned HRC staff members to work for five months with Equality Maine resulting in passage of marriage equality legislation.

**State Elections**

1. Worked with Indiana Equality to mobilize HRC members to vote for key state legislative candidates.
2. Organized 6 Presidential caucus trainings for LGBT Iowans and several for Minnesotans. Raised \$50,000+ for MN PAC and conducted Camp Equality training, helping secure net gains in fair-minded majorities in MN state House and Senate.
3. With TN Equality Project, defeated TN bill to bar gay and lesbian couples' adoptions.
4. Provided financial support for MA Transgender Political Coalition to hire 1st first full-time staff member.
5. Helped win fair-minded control of NV Senate.
6. Helped protect fair-minded majority in NH Senate and contributed staff member to work directly with them to pass civil unions and then marriage.
7. Raised \$160,000+ for NY state PAC and conducted Camp Equality on Long Island.
8. Raised \$40,000+ for HRC's OH Families PAC and placed Campaign College staffer in OH, helping secure fair-minded control of OH state House.
9. Helped increase 1-seat, fair-minded majority in PA House by raising \$100,000 for PA PAC and placing Campaign College staffer in key state legislative campaign.
10. Helped bring TX House within 2 votes of fair-minded control by raising \$125,000 for TX PAC, supporting field organizer, and HR contributing funds to 6 House candidates.

**PAC Support of Federal/Gubernatorial Candidates and Ballot Measures**

1. Endorsed 231 House candidates, 18 Senate candidates, 3 gubernatorial candidates and one Presidential/VP ticket in 2008; 90+% of endorsed candidates won.
2. Helped defeat anti-LGBT Senators Elizabeth Dole (R-NC), Ted Stevens (R-AK) and John Sununu (R-NH) and notoriously anti-LGBT Rep. Marilyn Musgrave (R-CO).
3. Raised \$3.5 million+ for fair-minded candidates and committees in 2008 election.
4. Instituted new online fundraising program increased # of online contributors over 2006 and 2004 cycles.
5. Hired and trained 25 HRC Campaign College activists (age 18-24) and placed them in races from AK to FL.
6. Updated publication, *Equality: A Winning Message*, to help candidates understand LGBT issues and how to talk about them.
7. Raised \$3.5 million to preserve marriage equality in CA.

**Public and LGBT Community Education**

1. Released 2009 *Corporate Equality Index* with record # of companies at 100% (260), revamped and updated Transgender Inclusion in the Workplace report, and 2nd annual *Healthcare Equality Index*.
2. Announced new *CEI* criteria raising requirements for businesses to earn 100% rating (health insurance access for transgender employees, equal benefits for same-sex partners and spouses, competency training and accountability on LGBT issues, and external engagement with LGBT community).
3. Launched innovative adoption awareness campaign targeting LGBT community.

**2009**

**Human Rights Campaign and Foundation (HRC)**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

4. Completed 1st year of Welcoming Schools pilot in 13 schools in 3 states. Each pilot school reported significant positive change in intentions to address gender and family diversity and that educators were better equipped to teach lessons on gender, anti-gay bullying and family diversity.
5. Created and began to implement a new congregational curricula, *Gender Identity and Our Faith Communities* and *For the Bible Tells Me So: A Study Guide and Advocacy Training Curriculum*.
6. Issued *Transgender Visibility, A Guide to Being You* (a rewrite of HRC's *Transgender Guide to Coming Out*).
7. Held 1st-ever "Come Out to Vote" youth video contest to celebrate National Coming Out Day and bring attention to 2008 election.

**Outreach to Diverse Communities in the LGBT Movement**

1. Conducted *Equality Forward*, national research effort to promote a greater understanding of diverse LGBT communities. Included focus groups and online poll to develop a body of knowledge about political attitudes, beliefs and opinions of over 5,000 African-American, Latino/a and Asian Pacific Islander LGBT people.
2. Conducted 2-year "Diversity & Inclusion Leaders" training program for volunteer leadership.
3. Organized "Claim Your Truth" leadership and skills training for 40 LGBT black youth from 15 historically black colleges and universities (HBCUs) and 1st Women and Leadership training.
4. Organized or participated in gospel and soul concerts and 23 POC pride events to connect HRC to POC communities.

**Communications and Outreach Expansion**

1. Opened field offices in IA and NH.
2. Hosted the 1st-ever live, televised Democratic presidential debate before an LGBT TV-viewing audience.

**Online Communications - Development**

1. Implemented mobile get-out-the-vote campaign for 2008 Presidential and congressional races.
2. Expanded Mobile Action Network by nearly 3x, doubled following on Facebook, created *Endthelies.org* campaign using Web 2.0 technology, and garnered greater community involvement with CA marriage "Won't Back Down" campaign.
3. Centralized all outbound communications and cut # of e-mails sent by HRC for improved member experience.

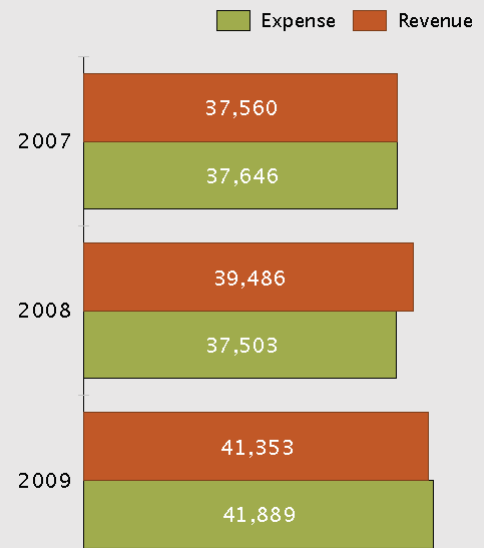
# 2009 Human Rights Campaign and Foundation (HRC) Standard Annual Report

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

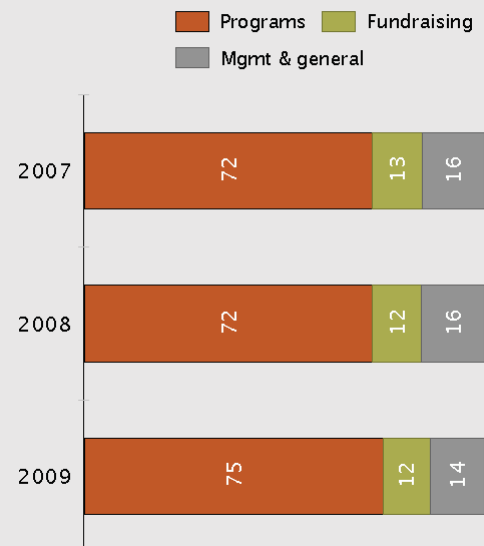
## Indicators of Financial Health & Efficiency

<i>Ratios of Financial Health</i>	For the fiscal year ending March 31		
	2007	2008	2009
Liquidity ratio	1.9	2.2	2.8
Days of working capital	105	103	90
Working capital (\$000)	\$10,259	\$10,010	\$9,716
Average daily cash expense (\$000)	\$98.0	\$97.4	\$108.5
Fundraising expense (cash only) to raise \$1	\$0.13	\$0.11	\$0.11
Total revenue raised through development efforts (\$000)	\$36,472	\$37,902	\$40,267
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	188,089	193,015	191,695
Number of individual donors who gave > \$1,000	9,918	10,197	9,696
Donor turnover (gave > \$35 in prior FY & not this FY)	46%	50%	51%
Number of individuals attending fundraising events (paid > \$100 per person)	22,959	24,049	20,667
Percent of total revenue from top 10 contributors	9%	9%	10%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 1,989,029	

### Revenue -vs- Expense (\$000)



### Expense Percentage



## Statement of Cash Flows

	<u>Audited</u> 2007	<u>Audited</u> 2008	<u>Audited</u> 2009
Cash and cash equivalent balance at beginning of year	\$3,102,209	\$3,195,756	\$5,412,982
Net cash provided (used) by operating activities	2,422,351	4,664,453	1,963,809
Net cash provided (used) by investing activities	896,196	-687,782	-2,448,300
Net cash provided (used) by financing activities	<u>-3,225,000</u>	<u>-1,759,445</u>	<u>-325,864</u>
Net increase (decrease) in cash	\$93,547	\$2,217,226	-\$810,355
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$3,195,756</u>	<u>\$5,412,982</u>	<u>\$4,602,627</u>

**2009 Human Rights Campaign and Foundation (HRC)**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> 2007		<u>Audited</u> 2008		<u>Audited</u> 2009
<b>Assets</b>					
Cash and cash equivalents	\$3,195,756		\$5,412,982		\$4,602,627
Investments	3,182,144		2,939,261		4,861,957
Other current assets	7,163,283		5,456,409		3,683,582
Net fixed assets	23,955,212		23,808,961		22,880,842
Other long-term assets	1,783,795		1,829,333		1,472,185
<b>Total Assets</b>	<b>\$39,280,190</b>		<b>\$39,446,946</b>		<b>\$37,501,193</b>
<b>Liabilities</b>					
Current liabilities	\$3,258,946		\$3,775,032		\$3,409,165
Long-term debt	7,625,000		5,474,523		5,702,417
Other long-term liabilities	74,138		190,544		182,097
<b>Total Liabilities</b>	<b>\$10,958,084</b>		<b>\$9,440,099</b>		<b>\$9,293,679</b>
<b>Net Assets</b>					
Unrestricted	21,553,783		25,261,987		25,647,378
Temporarily restricted	6,744,838		4,721,375		2,536,651
Permanently restricted	23,485		23,485		23,485
<b>Total Liabilities and Net Assets</b>	<b>\$39,280,190</b>		<b>\$39,446,946</b>		<b>\$37,501,193</b>

**Statement of Activities**

	<u>Audited</u> 2007		<u>Audited</u> 2008		<u>Audited</u> 2009	
<b>Support &amp; Revenue</b>						
Individual contributions	\$26,414,865	70%	\$28,235,723	72%	\$30,943,852	75%
Bequests	725,294	2%	844,750	2%	874,769	2%
Dues	0	0%	0	0%	0	0%
In-kind contributions	587,509	2%	468,314	1%	849,553	2%
Foundation contributions	872,849	2%	977,619	2%	419,398	1%
Corporate contributions/Non-event sponsorships	1,591,393	4%	1,627,478	4%	1,584,053	4%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	7,291,094	19%	6,842,863	17%	6,432,428	16%
Less costs of direct benefit to donors	-1,824,570	-5%	-1,898,056	-5%	-1,770,900	-4%
Net fundraising event income	\$5,466,524		\$4,944,807		\$4,661,528	
Merchandise sales (net of cost of goods sold)	813,935	2%	803,343	2%	934,064	2%
Investment income	1,087,284	3%	1,584,280	4%	1,085,313	3%
Other revenue	0	0%	0	0%	0	0%
<b>Total Revenue</b>	<b>\$37,559,653</b>		<b>\$39,486,314</b>		<b>\$41,352,530</b>	
<b>Expenses</b>						
Program services	25,747,223	68%	25,903,869	69%	29,915,527	71%
Fundraising	4,570,685	12%	4,261,941	11%	4,484,450	11%
Management and general	5,435,271	14%	5,380,407	14%	5,197,689	12%
Total cash expenses	\$35,753,179		\$35,546,217		\$39,597,666	
Non-cash expenses						
In-kind	587,509	2%	468,314	1%	849,553	2%
Depreciation	1,305,027	3%	1,488,693	4%	1,441,894	3%
Other	0	0%	0	0%	1,587,722	4%
Total non-cash expenses	\$1,892,536		\$1,957,007		\$3,879,169	
<b>Total Expenses</b>	<b>\$37,645,715</b>		<b>\$37,503,224</b>		<b>\$43,476,835</b>	
Capital campaign net revenue	121,804		-298,349		324,972	
<b>Change in Net Assets</b>	<b>\$35,742</b>		<b>\$1,684,741</b>		<b>-\$1,799,333</b>	

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Board Members						Locations & Contact
<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>		Human Rights Campaign and Foundation (HRC) 1640 Rhode Island Ave., NW Washington, DC 20036 800-777-4723 www.hrc.org
50	56%	44%	0%	Board members have a give or get requirement of \$50,000 per year.		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
4%	2%	84%	8%	2%	2%	<u>Additional Locations</u>
<b>Senior Management Profile</b>						San Francisco Provincetown
			<i>Lowest</i>	<i>Average</i>	<i>Highest</i>	<u>Legal Names</u>
Tenure with the organization			2.1	9.8	19.0	Human Rights Campaign - 501(c)(4)
Compensation			\$122,000	\$175,858	\$269,528	HRC Foundation - 501(c)(3)
<b>Paid Staff</b>						<u>Contact</u>
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	Joe Solmonese President & Executive Director joe.solmonese@hrc.org
150	149	1	54%	46%	2%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
13%	7%	76%	5%	0%	0%	
<p>Note: Board and staff data as of 3/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</p>						

**Organization's Notes and Advisories**

- HRC's Capital Campaign** - In FY2001, HRC launched "Building Equality", a capital campaign to raise funds for a permanent home in our nation's capital - a powerful symbol of our enduring commitment to make democracy work for every LGBT American.  
  
In a highly competitive real estate market, opening the doors to our own building in October 2003 also has meant savings for the organization versus leasing comparable space. Savings are currently \$780,000 per year with annual savings projected to increase through time. Although the capital campaign is a cost-saving measure over the span of its lifetime, on a year-to-year basis the revenue and expenses of the capital campaign vary significantly. Therefore, capital campaign income and expenses are not included in the calculation of statistics and performance measurements shown on page 5 of this Standard Annual Report (SAR). However, capital campaign receivables and net revenue are included in the Statement of Financial Position and Statement of Activities on page 6.
- Working Capital** - Working capital (defined as cash and cash equivalents plus investments plus other current assets minus current liabilities) is further reduced by the amount of permanently restricted net asset held as cash and/or investments. Accordingly, permanently restricted net assets of \$23,485 in FY2007, FY2008 and FY2009 have been removed from the cash balances in computing days of working capital and the liquidity ratio presented on page 5.



**2009**

**Immigration Equality  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1994	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$872,098	9
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

End discrimination in US immigration law, reduce its negative impact on the lives of LGBT and HIV-positive people, and help obtain asylum for those persecuted in their home countries based on their sexual orientation, transgender identity, or HIV-status. Through education, outreach, advocacy, and maintaining a nationwide network of resources, we provide information and support to advocates, attorneys, politicians and those threatened by persecution or the discriminatory impact of the law.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Mobilize LGBT, immigrant rights, and ally organizations to push for inclusion of the Uniting American Families Act (UAFSA) in comprehensive immigration reform legislation, and galvanize the LGBT community to support passage of comprehensive legislation.
2. Celebrate end of HIV immigration ban by training lawyers, doctors, social workers and community organizers about the repeal's meaning. Create and disseminate materials explaining the new law, and provide advice and representation to clients who are now eligible to visit or immigrate after the 22-year exclusion.
3. Expand access to asylum based on sexual orientation and gender identity by taking more appellate cases likely to lead to precedent-setting decisions; training 1,000 immigration judges and officers at 8 national asylum offices in rights of LGBT and HIV+ asylum-seekers; and producing and disseminating detailed resources for attorneys.
4. Gain full implementation of the 9 administrative and regulatory recommendations Immigration Equality submitted to the Obama transition team.
5. Build global gay migration field (dealing with unstable rights and recognition LGBT people face when crossing national borders) and pioneer new legal strategies for LGBT asylum seekers. Disseminate policy memos and publish magazine, blog, and law review articles to engage LGBT and human rights movements in global gay migration issues.

One-year Key Planned Accomplishments for FY2009

1. Expand the UAFSA Working Group into full-fledged LGBT campaign for comprehensive immigration reform (CIR) and mobilize local, state, and national LGBT groups and activists for comprehensive legislation. Stimulate 1000s of individuals to call/write Congress and 100s of LGBT organizations to sign onto and organize events for CIR.
2. Monitor regulatory implementation of HIV ban repeal and provide public with information about consequences of repeal. This includes marshaling public comments supportive of proposed regulations that remove HIV from "communicable diseases of public health significance" and pressuring HHS Department to complete full repeal.
3. Double Spokesfamilies Bureau to 100 fully media-trained families and complete integration of Spokesfamilies Bureau with data from the legal intake and donation pipelines. Connect spokesfamilies with media opportunities in Congressional districts targeted to aid passage of UAFSA and other advocacy goals.
4. Provide advice, information, and referrals to 1,500+ people a year, while continuing direct representation and pro bono supervision of nearly 200 asylum cases each year.
5. Lead coalition and convene experts on immigration, prison reform, and transgender rights to draft standards on housing and medical treatment of transgender people in immigration detention. Share conclusions with Department of Homeland Security (requested by Obama administration).

**2009**

**Immigration Equality**  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

6. Increase participation in business coalition supporting UAFA to 20 to 30 corporations. With allied groups, highlight LGBT immigration as diversity issue and "brain drain."

Key Accomplishments in FY2008

1. Won repeal of 15-year-old law banning HIV+ people from entering US (called by Andrew Sullivan, "the only federal gay rights achievement of the past 8 years"). Immigration Equality built advocacy coalition supporting Senator John Kerry's push for repeal, galvanized significant press coverage about the victory, and kept heat on administrative agencies responsible for implementing the change.
2. Opened policy office in DC, a permanent, tangible presence for LGBT immigration issues on the Hill. Via coalition work, Immigration Equality's new Policy Director has vastly expanded Congressional support for UAFA and stimulated 1st Congressional hearing on UAFA (including supportive testimony by NAACP and ABA). Congressman Mike Honda (D-CA) introduced Reuniting Families Act (RFA), a precursor to comprehensive immigration legislation and the 1st multi-issue bill ever to include lesbian and gay families.
3. Made Shirley Tan and Jaylynn Mercado the face of LGBT immigration discrimination in national and CA media, including features in People, New York Times and TV, radio, and in newspapers throughout CA. Spokesfamilies Bureau trained 30 new spokespersons in target legislative districts and placed favorable features on them in local outlets, e.g., Wisconsin State Journal, South Florida Sun Sentinel, Detroit News, and Minnesota Post. Washington Post and San Francisco Chronicle editorials called for passage of UAFA.
4. Call volume to national intake hotline increased 13% and direct representation increased 50%. Legal team represented 184 asylum-seekers and won 55 of 56 cases closed in 2008 (83% more victories than in 2007). Pro bono program expanded to 38 national law firms and \$11 million in donated legal services in 2008. American Immigration Lawyers Association published Immigration Law and the Transgender Client, a first-of-a-kind guide for attorneys co-authored by Immigration Equality and TLC.
5. Built Immigration Equality's Corporate Roundtable to include 10 companies whose LGBT employee resource groups, HR and diversity professionals, and senior executives have committed to ending LGBT immigration discrimination. Several members (e.g., Pfizer, Omnicom, and Cisco) have committed to joining the Business Coalition for UAFA.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

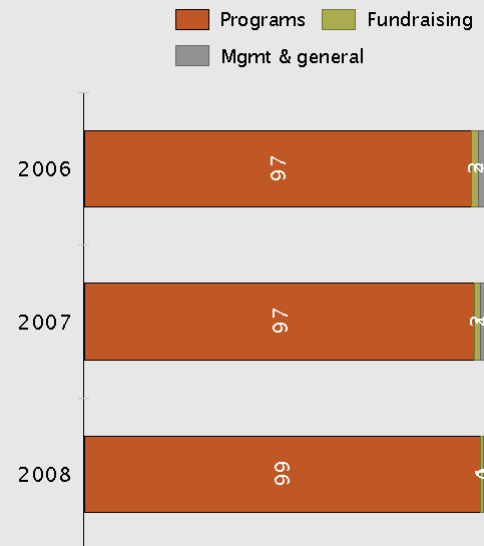
For the fiscal year ending December 31

<i>Ratios of Financial Health</i>	2006	2007	2008
Liquidity ratio	10.6	14.4	22.1
Days of working capital	181	303	343
Working capital (\$000)	\$240	\$494	\$769
Average daily cash expense (\$000)	\$1.3	\$1.6	\$2.2
Fundraising expense (cash only) to raise \$1	\$0.12	\$0.11	\$0.08
Total revenue raised through development efforts (\$000)	\$622	\$913	\$1,011
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	317	489	611
Number of individual donors who gave > \$1,000	28	56	51
Donor turnover (gave > \$35 in prior FY & not this FY)	36%	61%	54%
Number of individuals attending fundraising events (paid > \$100 per person)	408	242	364
Percent of total revenue from top 10 contributors	9%	9%	4%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 20,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$80,805	\$160,340	\$323,081
Net cash provided (used) by operating activities	99,581	163,341	222,242
Net cash provided (used) by investing activities	-20,046	-600	-282,325
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$79,535	\$162,741	-\$60,083
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$160,340</u>	<u>\$323,081</u>	<u>\$262,998</u>

**2009**

**Immigration Equality  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<i>Assets</i>					
Cash and cash equivalents	\$160,340		\$323,081		\$262,998
Investments	0		731		270,451
Other current assets	95,000		193,063		260,041
Net fixed assets	60,861		45,612		39,273
Other long-term assets	10,825		86,320		11,307
<b>Total Assets</b>	<b>\$327,026</b>		<b>\$648,807</b>		<b>\$844,070</b>
<i>Liabilities</i>					
Current liabilities	\$15,184		\$22,564		\$24,190
Long-term debt	0		0		0
Other long-term liabilities	0		1,100		1,100
<b>Total Liabilities</b>	<b>\$15,184</b>		<b>\$23,664</b>		<b>\$25,290</b>
<i>Net Assets</i>					
Unrestricted	201,842		405,143		643,780
Temporarily restricted	110,000		220,000		175,000
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$327,026</b>		<b>\$648,807</b>		<b>\$844,070</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$164,404	4%	\$316,350	5%	\$319,249	3%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	3,456,213	85%	5,353,144	85%	11,444,484	92%
Foundation contributions	376,000	9%	545,000	9%	563,591	5%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	99,269	2%	69,446	1%	159,577	1%
Less costs of direct benefit to donors	-18,098	-0%	-18,251	-0%	-31,005	-0%
Net fundraising event income	\$81,171		\$51,195		\$128,572	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	-280	-0%
Other revenue	-8,052	-0%	12,430	0%	19,912	0%
<b>Total Revenue</b>	<b>\$4,069,736</b>		<b>\$6,278,119</b>		<b>\$12,475,528</b>	
<i>Expenses</i>						
Program services	351,450	9%	437,682	7%	677,876	6%
Fundraising	72,480	2%	96,819	2%	85,119	1%
Management and general	59,141	2%	61,324	1%	55,748	0%
Total cash expenses	\$483,071		\$595,825		\$818,743	
Non-cash expenses						
In-kind	3,413,438	87%	5,353,144	90%	11,444,484	93%
Depreciation	11,488	0%	15,849	0%	18,664	0%
Total non-cash expenses	\$3,424,926		\$5,368,993		\$11,463,148	
<b>Total Expenses</b>	<b>\$3,907,997</b>		<b>\$5,964,818</b>		<b>\$12,281,891</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$161,739</b>		<b>\$313,301</b>		<b>\$193,637</b>	

2009

# Immigration Equality

## Standard Annual Report

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Board Members

### Locations & Contact

Total	Male	Female	Transgender	Fundraising Requirements	
10	60%	40%	0%	Expected to make personally significant annual contributions: ¼ to give at least \$1,500, ½ at least \$3,000, and ¼ at least \$10,000; ¼ will raise, \$25,000, ½ will raise \$20,000, and ¼ will raise at least \$10,000.	
<i>African American/Black</i>					
10%	<i>Asian/Pacific Islander</i>		70%	<i>Hispanic/Latino(a)</i>	
10%	0%	70%	10%	10%	0%
<i>Native American</i>					
<i>Other</i>					

Immigration Equality  
40 Exchange Place, 17th Floor  
New York, NY 10005  
212-714-2904  
www.immigrationequality.org

Additional Locations

Washington DC

Legal Names

Immigration Equality - 501(c)(3)

Contact

Rachel B. Tiven  
Executive Director  
rtiven@immigrationequality.org

### Senior Management Profile

	Lowest	Average	Highest
Tenure with the organization	0.1	2.7	7.0
Compensation	\$38,000	\$65,333	\$90,000

### Paid Staff

Total	Full-Time	Part-Time	Male	Female	Transgender
9	9	0	56%	44%	0%
<i>African American/Black</i>					
0%	<i>Asian/Pacific Islander</i>		78%	<i>Hispanic/Latino(a)</i>	
0%	0%	78%	22%	0%	0%
<i>Native American</i>					
<i>Other</i>					

*Note: Board and staff data as of 5/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

### Organization's Notes and Advisories

1. **Donated Legal Services** - Nearly 40 national law firms donate their time and costs to represent Immigration Equality's LGBT and HIV-positive asylum-seekers. In FY2008, that pro bono work was valued at more than \$11 million. These donated legal services helped Immigration Equality represent 184 people fleeing persecution on account of their sexual orientation, gender identity, and HIV status.
2. **Diversity** - Immigration Equality is striving to further diversify its staff and board by race, ethnicity, HIV status, and gender identity. In addition, immigrant status is an extremely high-diversity priority for the organization: currently, 5 board and staff members are immigrants.
3. **History** - Immigration Equality was founded in 1994 to help LGBT and HIV-positive refugees take advantage of a new law recognizing sexual orientation-based asylum claims, and to fight for immigration rights for same-sex couples and those living with HIV/AIDS. The organization has grown from an all-volunteer task force to a national organization with offices in New York City and Washington, D.C.
4. **HIV Ban** - As this profile went to press, the Department of Health of Human Services was in the middle of a 45-day public comment period on its proposed regulations to end the HIV travel and immigration ban once and for all. Immigration Equality is now mobilizing its coalition of public health and HIV/AIDS groups to ensure the Department of Health and Human Services implements the repeal swiftly and correctly. Over the next several years, Immigration Equality's legal team will continue to publicize the changes and counsel immigrants with HIV and their families on the impact of the new law.



**2009**

**In The Life Media, Inc.**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1994	International
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Arts/media
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,340,423	13
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Produce change through innovative media that exposes social injustice by chronicling LGBT life and providing audiences with effective ways to advance equality within and beyond our communities.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Media for the Movement** – Convert increasing #s of IN THE LIFE viewers into activists by steering viewers to Web and social networking sites of In The Life Media (ITLM) and partner community/advocacy organizations and blogs, where viewers can act on what they've seen. To enable this, ITLM will:
  - Create new video player/activism widget that enables viewers of a video clip to take immediate action with push of a button. Widget will also enable ITLM to collect viewer information to be stored in a database, and offer viewers access to additional ITLM content.
  - Produce original, issue-based content specifically designed for broad online distribution by partners and individual activists and which inspires viewer activism.
  - Place ITLM video content and online activism tools in as many outlets as possible through partnerships, websites and social activists.
  - Proactively build relationships with viewers who have taken action (as captured in ITLM database) to increase their activism and financial support of ITLM.
- Video Production House** – Utilize our vast audiovisual archive, in-house production studio and experienced staff to help LGBT and allied organizations promote their issues, raise their visibility with the public and communicate their programs and effectiveness.
- Digital Archive** – Continue working with pro bono legal assistance to audit releases and rights for entire archive. Continue exploring partnerships with archives and libraries for encoding and cataloguing of 5,000+ hour video collection. Once an institutional partnership is established, begin joint effort to raise the estimated \$1.5 million dollars needed to preserve the archive and make it available to the general public.

One-year Key Planned Accomplishments for FY2010

- Content Production** – Produce 8 hard-hitting, investigative stories about issues relevant to LGBT people/allies that require citizen action to create change. Produce 10 A Conversation With... segments featuring LGBT/allied leaders, intellectuals, activists, and celebrities in candid dialogue about LGBT issues. Launch "Document Your Life" program encouraging activists to contribute content to the ITLM website and YouTube Channel. Repurpose IN THE LIFE content and develop new content for 3- to 5-minute issue segments for ITLM's website and video player/widget (described above).
- Online Technology** – Develop and launch portable video player/activism widget and launch marketing of activism and funding opportunities to activists identified via the widget. Develop tools to help activists place ITLM widget and issues-based content on their social networking pages. Develop Web page providing comprehensive referrals to LGBT activist organizations.

**2009**

**In The Life Media, Inc.**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. **Distribution** – Secure placement of ITLM issue segments and activism tools in online outlets via: strategic relationships with activist organizations, cross-posting relationship program, social networking site development, widget distribution program (blogs, news sites, activists, social networks), paid/earned advertisement placements, and alliance with 1 LGBT film festival in a major metro area.
4. **Organization Development** – Develop additional earned-income streams: media production for LGBT/allied organizations; increase licensing, distribution, and DVD sales; ITLM online store and product line; deal with for-profit educational distribution company.

Key Accomplishments in FY2009

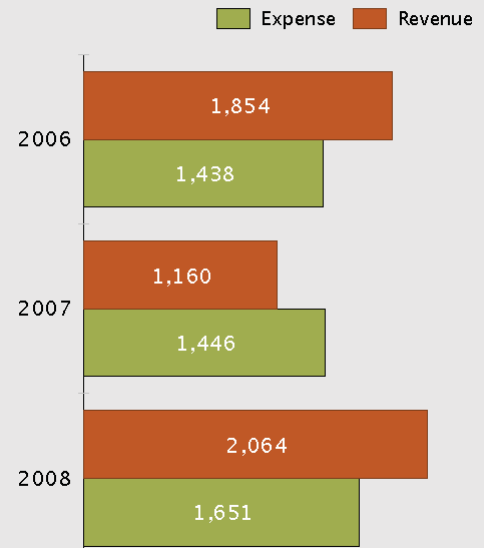
1. Finalized new 3-year strategic plan, "**Media for the Movement,**" mission and value statement that morph ITLM into media production and distribution house for the LGBT movement.
2. **Content Production** – Produced:
  - 12 feature stories on topics e.g., funding of CA Prop 8, ex-gay ministries, gender identity disorder, HIV infection among young men of color. Segments highlighted work of The Trevor Project, Hetrick-Martin Institute, The Task Force, The Black AIDS Institute, NCTE, NCLR and GroundSpark among others.
  - 13 "A Conversation With..." segments with, e.g., NAACP Chairman Julian Bond, Pulitzer Prize winner Jonathan Capehart, NY Governor David Paterson, LGBT Historian George Chauncey, Lady Bunny, Larry Kramer, and Bishop Gene Robinson.
  - 12 Web-exclusive videos to supplement monthly episodes with additional footage and extended interviews.
  - 3-part "Summer of Stonewall" 40th anniversary commemoration, including all-new, 1-hour special and 2 half-hour episodes with new and archival material.
  - Organizational videos for Lambda Legal and NAACP sponsorship video for Arcus Foundation.
3. **Online Technology:**
  - Launched *Education = Action* program to give viewers access to online advocacy resources related to each episode's feature story.
  - For 80-day online "Summer of Stonewall" campaign, created micro-site on 40-year history of LGBT activism and micro-site with daily suggestions for viewers to take action, e.g., register to vote, contact legislators about Matthew Shepard Act, report media defamation, and volunteer with state-based LGBT organizations.
  - Refreshed ITLM homepage to make resources for educators, freelance producers and supporters more accessible.
4. **Distribution:**
  - Collaborated with 50+ LGBT/allied organizations to distribute IN THE LIFE content to constituents.
  - Partnered with online dating site MANHUNT to promote World AIDS Day segment on viral HIV-prevention ("HIV Is Still a Big Deal") developed by New York University researchers. 30,000+ people viewed videos on ITFM website or hivbigdeal.org during premiere week.
  - Increased website traffic by 11% and page views by 38%.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

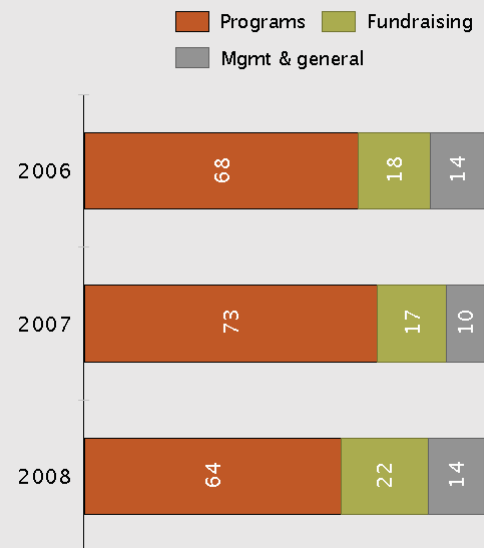
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	1.5	1.7	1.3
Days of working capital	84	45	44
Working capital (\$000)	\$317	\$170	\$177
Average daily cash expense (\$000)	\$3.8	\$3.8	\$4.0
Fundraising expense (cash only) to raise \$1	\$0.15	\$0.22	\$0.17
Total revenue raised through development efforts (\$000)	\$1,689	\$1,143	\$2,049
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	2,159	2,328	1,602
Number of individual donors who gave > \$1,000	66	93	89
Donor turnover (gave > \$35 in prior FY & not this FY)	15%	20%	17%
Number of individuals attending fundraising events (paid > \$100 per person)	29	128	100
Percent of total revenue from top 10 contributors	44%	70%	41%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 38,307	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$25,928	\$132,727	\$103,013
Net cash provided (used) by operating activities	186,891	-25,194	-134,883
Net cash provided (used) by investing activities	-20,092	-4,520	-6,347
Net cash provided (used) by financing activities	-60,000	0	100,000
Net increase (decrease) in cash	\$106,799	-\$29,714	-\$41,230
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$132,727</u>	<u>\$103,013</u>	<u>\$61,783</u>

**2009**

**In The Life Media, Inc.**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$132,727		\$103,013		\$61,783
Investments	0		0		0
Other current assets	272,372		128,310		162,705
Net fixed assets	366,708		313,567		265,317
Other long-term assets	108,010		48,010		610,201
<b>Total Assets</b>	<b>\$879,817</b>		<b>\$592,900</b>		<b>\$1,100,006</b>
<b>Liabilities</b>					
Current liabilities	\$88,390		\$61,615		\$47,315
Long-term debt	0		0		100,000
Other long-term liabilities	110,848		136,254		145,019
<b>Total Liabilities</b>	<b>\$199,238</b>		<b>\$197,869</b>		<b>\$292,334</b>
<b>Net Assets</b>					
Unrestricted	311,829		176,858		110,341
Temporarily restricted	368,750		218,173		697,331
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$879,817</b>		<b>\$592,900</b>		<b>\$1,100,006</b>

**Statement of Activities**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$565,284	30%	\$526,462	45%	\$1,036,909	50%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	120,000	6%
Foundation contributions	1,060,000	57%	528,100	46%	850,160	41%
Corporate contributions/Non-event sponsorships	14,185	1%	755	0%	10,657	1%
Government funding	0	0%	0	0%	0	0%
Program income	155,523	8%	11,334	1%	11,557	1%
Fundraising event income	85,843	5%	99,212	9%	33,175	2%
Less costs of direct benefit to donors	-38,324	-2%	-12,391	-1%	-5,355	-0%
Net fundraising event income	\$47,519		\$86,821		\$27,820	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	11,131	1%	7,015	1%	6,624	0%
<b>Total Revenue</b>	<b>\$1,853,642</b>		<b>\$1,160,487</b>		<b>\$2,063,727</b>	
<b>Expenses</b>						
Program services	940,381	65%	1,009,286	70%	1,012,025	61%
Fundraising	251,808	18%	246,960	17%	355,839	22%
Management and general	191,321	13%	132,128	9%	108,625	7%
Total cash expenses	\$1,383,510		\$1,388,374		\$1,476,489	
Non-cash expenses						
In-kind	0	0%	0	0%	120,000	7%
Depreciation	54,796	4%	57,661	4%	54,597	3%
Total non-cash expenses	\$54,796		\$57,661		\$174,597	
<b>Total Expenses</b>	<b>\$1,438,306</b>		<b>\$1,446,035</b>		<b>\$1,651,086</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$415,336</b>		<b>-\$285,548</b>		<b>\$412,641</b>	

**2009**

**In The Life Media, Inc.  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

Total	Male	Female	Transgender	Fundraising Requirements	
9	56%	44%	0%	\$10,000 per fiscal year	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
11%	0%	89%	0%	0%	0%

**Locations & Contact**

In The Life Media, Inc.  
184 Fifth Avenue, 4th Floor  
New York, NY 10010  
212-255-6012  
www.inthelifetv.org

Additional Locations

None

Legal Names

In The Life Media, Inc. - 501(c)(3)

Contact

Michelle Kristel  
Executive Director  
mkristel@inthelifetv.org

**Senior Management Profile**

	Lowest	Average	Highest
Tenure with the organization	0.5	2.8	6.8
Compensation	\$52,000	\$64,000	\$85,000

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
13	10	3	38%	62%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
15%	0%	77%	8%	0%	0%

*Note: Board and staff data as of 5/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Organization History** - The 1st 3 seasons of IN THE LIFE (1992-1994) were produced under the umbrella of Media Networks, Etc. In The Life Media was incorporated in 1994 and received 501(c)(3) status in May 1995.
- FY2008 Expense Percentage** - We concluded a year-long engagement with Fiscal Management Associates which included a review of expense allocations. The fundraising expense is higher than prior years because of implementation of a more conservative functional expense allocation methodology.
- Organizational Reach** - While IN THE LIFE has 38,307 contactable names in our databases, through our monthly broadcasts on public television stations nationwide, IN THE LIFE is seen by more than 5 million viewers annually - 10% (500,000) of whom are straight (based respectively on Nielsen Ratings and viewer surveys).
- In-Kind Contributions** - We received in-kind donations to assist with a comprehensive organization-wide re-brand.
- Temporarily Restricted Net Assets** - The balance reflects a bequest from the estate of Ric Weiland payable over a period of eight years; the full amount of the bequest was recorded as revenue in FY2008.
- Revenue (FY2006-FY2007)** - In looking at the three years, FY2007 appears to reflect a substantial decrease in revenue from the prior year. This is the result of two factors: 1) We received a number of multi-year grants from foundations that are no longer offering such grants. For example, in FY2006 the Ford Foundation made a two-year grant of \$300,000. The full \$300,000 was recorded as revenue in FY2006, even though IN THE LIFE received \$150,000 from the foundation in both FY2006 and FY2007; and, 2) In FY2006, IN THE LIFE entered into a two-year strategic partnership with the gay cable channel LOGO. LOGO paid \$150,000 to acquire exclusive rights to 20 hours of IN THE LIFE programming.



**2009**

**L.A. Gay & Lesbian Center**  
**Standard Annual Report**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1971	Southern California, National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$47,436,277	279
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

**EMPOWER** people to lead full and rewarding lives without limits based on sexual orientation (SO) and gender identity (GI), by providing highest-quality educational, cultural, and wellness programs to residents of Los Angeles (LA) County; **HEAL** damage caused by discrimination based on SO and GI, by providing highest-quality health and social services; **ADVOCATE** at local, state, and national levels for full access and equality for all people regardless of SO or GI; and **LEAD** by living our values, sharing our expertise, and celebrating the full diversity of our lives, families, and communities.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

The L.A. Gay & Lesbian Center completed a 5 - 10 year strategic plan in early 2008 (to be supplemented by more detailed plans during the annual budget and planning process). Its general goals are to:

1. Expand medical services to serve people regardless of HIV status;
2. Expand housing services;
3. Expand senior services;
4. Expand youth services, to include a leadership development program; and,
5. Create a public policy, community building and research department.

One-year Key Planned Accomplishments for FY2010

1. Continue services and programs in priority program areas.
2. Advance implementation of the long-term strategic plan as follows:
  - Establish services for non-homeless but still at-risk LGBT youth; explore expansion of housing for homeless youth
  - Secure Federally Qualified Health Center – Look Alike status; begin expansion of primary care medical services to 1+ target populations without HIV; refine electronic medical records system
  - Continue piloting international LGBT leadership development program; attempt to secure funding for its continuation
  - Expand senior programs and stimulate greater involvement of women; explore options for additional affordable housing for LGBT seniors
  - Create and pilot local leadership/community-building program
  - Expand federal advocacy role with emphasis on equality in social security benefits
  - Continue Vote for Equality work; develop/prove models for changing the minds of people who currently oppose freedom to marry and for training other organizations within and outside CA

**2009**

**L.A. Gay & Lesbian Center**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

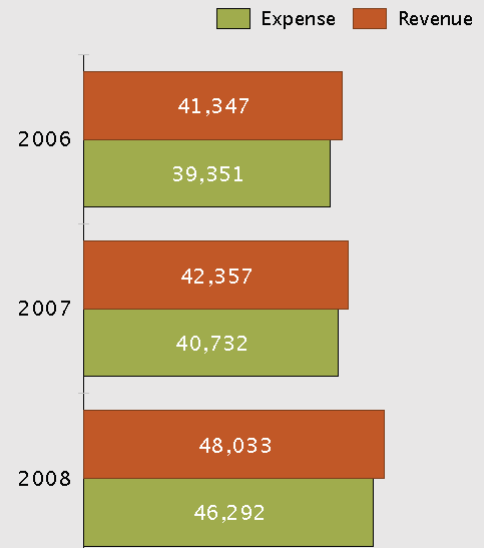
1. Hired Director of Strategic Initiatives and Senior Director of Planned Giving, thus deepening executive team and enhancing planned giving efforts
2. Piloted international leadership development of internship programs with Chinese LGBT activists
3. Submitted formal application for Federally Qualified Health Center – Look Alike status
4. Secured significant funding for, purchased and implemented electronic medical records system
5. Hired Senior Policy Counsel to create Policy & Community Building Department
6. Established 10 emergency shelter beds for homeless LGBT youth, as feeders for transitional living program beds
7. Expanded senior programs/services and added additional staff
8. Continued delivering services and programs in priority areas: residential and other supportive programs for homeless youth; HIV testing, medical care and pharmaceuticals; STD testing and treatment; HIV prevention education; mental health services; addiction recovery; domestic violence prevention and treatment; legal services; family services; senior services; educational programming, cyber center; employment services; arts and cultural programs; voter identification and education; and, policy work and advocacy in the areas of LGBT civil rights, health & AIDS/HIV
9. Improved and refined internal controls and financial/accounting systems; fully automated budgeting process
10. Played leadership role in campaign to defeat CA Proposition 8 (the proposition eliminated marriage rights for same-sex couples)

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

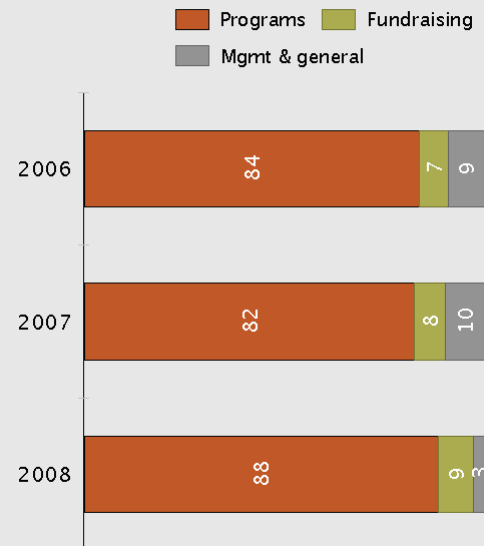
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.5	0.6	0.7
Days of working capital	12	20	34
Working capital (\$000)	\$1,274	\$2,124	\$4,142
Average daily cash expense (\$000)	\$103.3	\$107.7	\$122.5
Fundraising expense (cash only) to raise \$1	\$0.31	\$0.36	\$0.42
Total revenue raised through development efforts (\$000)	\$8,301	\$8,370	\$9,226
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	25,134	25,531	29,331
Number of individual donors who gave > \$1,000	784	885	981
Donor turnover (gave > \$35 in prior FY & not this FY)	77%	64%	87%
Number of individuals attending fundraising events (paid > \$100 per person)	1,260	1,675	1,507
Percent of total revenue from top 10 contributors	3%	3%	3%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 180,886	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$807,472	\$936,845	\$1,279,044
Net cash provided (used) by operating activities	1,500,980	1,998,161	2,818,317
Net cash provided (used) by investing activities	-1,102,726	-1,169,144	-773,828
Net cash provided (used) by financing activities	-268,881	-486,818	-1,727,012
Net increase (decrease) in cash	\$129,373	\$342,199	\$317,477
<b>Cash and Cash Equivalent Balances at End of Year</b>	<b>\$936,845</b>	<b>\$1,279,044</b>	<b>\$1,596,521</b>

# L.A. Gay & Lesbian Center

## Standard Annual Report

**2009**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

### Statement of Financial Position

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$936,845		\$1,279,044		\$1,596,521
Investments	4,219,885		4,437,336		4,596,698
Other current assets	6,118,078		5,687,987		6,454,102
Net fixed assets	11,638,519		11,535,523		11,506,325
Other long-term assets	6,803,988		7,532,998		6,801,663
<b>Total Assets</b>	<b>\$29,717,315</b>		<b>\$30,472,888</b>		<b>\$30,955,309</b>
<b>Liabilities</b>					
Current liabilities	\$10,001,093		\$9,280,006		\$8,505,688
Long-term debt	6,171,752		5,676,850		5,167,788
Other long-term liabilities	533,144		879,964		904,210
<b>Total Liabilities</b>	<b>\$16,705,989</b>		<b>\$15,836,820</b>		<b>\$14,577,686</b>
<b>Net Assets</b>					
Unrestricted	1,741,050		8,170,292		10,035,431
Temporarily restricted	8,346,487		3,167,567		3,514,287
Permanently restricted	2,923,789		3,298,209		2,827,905
<b>Total Liabilities and Net Assets</b>	<b>\$29,717,315</b>		<b>\$30,472,888</b>		<b>\$30,955,309</b>

### Statement of Activities

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$2,290,964	6%	\$2,027,965	5%	\$1,940,632	4%
Bequests	844,028	2%	606,123	1%	729,746	2%
Dues	0	0%	0	0%	0	0%
In-kind contributions	929,204	2%	840,188	2%	956,649	2%
Foundation contributions	808,236	2%	674,918	2%	835,500	2%
Corporate contributions/Non-event sponsorships	1,918	0%	10,000	0%	87,500	0%
Government funding	12,000,597	29%	10,526,926	25%	11,126,568	23%
Program income	20,977,293	51%	22,120,294	52%	26,690,404	56%
Fundraising event income	3,346,497	8%	4,613,390	11%	5,748,481	12%
Less costs of direct benefit to donors	-98,100	-0%	-75,985	-0%	-91,490	-0%
Net fundraising event income	\$3,248,397		\$4,537,405		\$5,656,991	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	41,445	0%	669,693	2%	-80,064	-0%
Other revenue	205,105	0%	343,490	1%	89,179	0%
<b>Total Revenue</b>	<b>\$41,347,187</b>		<b>\$42,357,002</b>		<b>\$48,033,105</b>	
<b>Expenses</b>						
Program services	31,686,231	81%	32,262,433	79%	39,585,596	86%
Fundraising	2,613,425	7%	3,031,164	7%	3,862,677	8%
Management and general	3,399,722	9%	4,000,711	10%	1,249,617	3%
Total cash expenses	\$37,699,378		\$39,294,308		\$44,697,890	
Non-cash expenses						
In-kind	929,204	2%	840,188	2%	956,649	2%
Depreciation	722,109	2%	597,764	1%	637,011	1%
Total non-cash expenses	\$1,651,313		\$1,437,952		\$1,593,660	
<b>Total Expenses</b>	<b>\$39,350,691</b>		<b>\$40,732,260</b>		<b>\$46,291,550</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$1,996,496</b>		<b>\$1,624,742</b>		<b>\$1,741,555</b>	

2009

**L.A. Gay & Lesbian Center**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
23	57%	43%	4%	Board members must give a minimum of \$1,500 and raise a minimum of \$20,000 annually (this is reduced to \$10,000 for first year board members).	
African American/Black	Asian/Pacific Islander	Caucasian	Hispanic/Latino(a)	Native American	Other
4%	14%	78%	4%	0%	0%

L.A. Gay & Lesbian Center  
1625 N. Schrader Blvd.  
Los Angeles, CA 90028  
323-993-7400  
www.lagaycenter.org

Additional Locations

4 additional sites in L.A.

Legal Names

L.A. Gay and Lesbian Center  
- 501(c)(3)

Contact

Lorri L. Jean  
Chief Executive Officer  
ljean@lagaycenter.org

**Senior Management Profile**

	Lowest	Average	Highest
Tenure with the organization	1.0	7.8	15.0
Compensation	\$120,000	\$164,574	\$286,000

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
279	244	35	54%	46%	4%
African American/Black	Asian/Pacific Islander	Caucasian	Hispanic/Latino(a)	Native American	Other
15%	7%	39%	33%	1%	5%

Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- Statement of Activities** - Under the "Support & Revenue" column of the financial statements, the 2 largest items are in the "Government funding" and "Program income" categories. "Program Income" is also government funding, but it comes in a form different than standard government grants.
- Days of Working Capital** - Working capital statistics must be assessed very differently for social services organizations that are funded mostly through government grants because the finances of such operations are very different from the finances of operations that are funded predominantly or exclusively by privately raised funds. Two of the most relevant differences bearing on the calculation and accrual of working capital are government reimbursement practices and funding purpose restrictions. First, government funded organizations must have significant credit lines in order to operate because they are required to advance the costs of providing service. They bill the government after the services have been provided and await reimbursement on the government's usually unpredictable timetable. For larger organizations, this necessitates a very large credit line. Second, government grants do not provide working capital; in fact, such use is impermissible. Thus, the nature of working capital is different for predominantly government funded organizations. Specifically, for the large LGBT organizations with no government grants (e.g., Lambda Legal, HRC, and The Task Force), the days of working capital represent how many privately raised dollars they have to continue operations that are funded by those private dollars. If an apples-to-apples comparison were made to the L.A. Gay & Lesbian Center for 2008, its working capital would support 127 days of operations that are funded by private dollars.
- Fundraising Expense** - The Center's current fundraising percentage is higher than that of most other large LGBT organizations participating in the MAP project because the Center has been very conservative in its method of allocating fundraising expenses. Unlike most other large LGBT organizations, we have not allocated to programs any expenses from

**2009**

**L.A. Gay & Lesbian Center**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

our fundraising dinners, direct mail, telemarketing or fundraising staff. Had we done so, as most other large LGBT organizations do, this would have resulted in a significant reduction in the percentage that appears in this report. MAP staff have advised us that we might not be taking sufficient advantage of the regulations that permit such allocation and we will be reassessing our allocation practices for the future. In addition, the Center's fundraising percentage was higher as development revenues were lower than plan because of the recession, while fixed development costs did not decline.

4. **Donor Turnover** - Donor turnover appears high in comparison to other organizations because a majority of donors who gave over \$35 are people who gave to the Center's AIDS/LifeCycle, a 7-day pledge event that attracts donors in support of individual cyclists. These donors do not return the next year if their individual cyclist does not return. So, while the number of donors is increasing as cyclists increase, the turnover rate among those donors is fairly constant. For those donors who give specifically to the Center (rather than in support of a cyclist), the turnover rate is much lower.

2009

**Lambda Legal Defense**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1973	National
<i>Fiscal Year</i>	<i>Type</i>
Nov - Oct	Legal
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$10,678,498	84
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Achieve full recognition of the civil rights of LGBT people and those with HIV through impact litigation, education and public policy work.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- Rights of Same-Sex Couples** - Pursue litigation, public education, and advocacy in strategically selected states to win the freedom to marry, to win respect for same-sex couples' out-of-state marriages, and to win or preserve benefits and rights for those in same-sex relationships apart from marriage (including through statuses such as civil unions and domestic partnerships and based on legal and equitable principles).
- Workplace Fairness** - Enforce, expand, and defend protections against employment discrimination and harassment for LGBT and HIV+ workers; educate the LGBT and HIV+ community about their rights in the workplace; and provide tools to help LGBT and HIV+ individuals win greater workplace protections and equal benefits from employers.
- Parenting** - Pursue litigation to secure legal ties between children and their LGBT parents and provide current, accessible information to parents, prospective parents, policymakers, and media on relevant case law, trends, issues, and guiding principles affecting LGBT parent-child law.
- Rights of Transgender and HIV+ People** - Pursue litigation, public education and advocacy to expand and defend protections against discrimination and to promote fair treatment for both transgender and HIV+ individuals.
- Rights of LGBT Youth** - Engage in litigation, advocacy and public education to empower LGBT youth to be open and to be treated fairly in schools and in the child welfare, juvenile justice and other systems of out-of-home care.
- Health Care Fairness** - Pursue litigation, public education and advocacy to protect rights of LGBT and HIV+ people to patient autonomy and privacy, to counter discriminatory denials of health care, and to obtain same-sex partner recognition for purposes of hospital visitation and medical decision-making.

One-year Key Planned Accomplishments for FY2009

- Increase # of states that **provide legal protections to same-sex couples and their families** and expand existing state protections through marriage, domestic partnerships, life planning documents, and enforcement of common law and equitable principles.
  - Win marriage equality in IA. Provide legal expertise, public education and advocacy in support of legislative efforts to secure protections for same-sex couples in US, CT, HI, IL, NM, NV, NY, OR, and WA law.
  - Defend against challenges to IA marriage victory, pre-Prop 8 marriages of same-sex couples in CA, and NY recognition of out-of-state marriages of same-sex couples. Pursue legal challenges to CA Prop 8 and limit reach of LA, OH, and WI anti-marriage constitutional amendments.
  - Prosecute lawsuits seeking benefits and respect for same-sex relationships other than marriage in FL and NY. Continue large-scale education campaign around Lambda Legal toolkits for life and economic planning for LGBT and HIV affected people and families (e.g., educational materials about wills, medical power of attorney and other tools to protect LGBT individuals and families in emergency, illness or death).
- Increase # of jurisdictions and workplaces that **protect LGBT and HIV+ individuals against job discrimination** and strengthen existing protections. Litigate sexual orientation (SO), gender identity (GI) and HIV employment discrimination cases in AZ, CA, CT, GA, IL, MA, NY, WA, and WI. Provide legal support to efforts to include SO and GI in local, state, and federal nondiscrimination laws and fight opponents' challenges to GI nondiscrimination laws in FL and MD.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. Increase # of states with case law adequately **protecting relationships between LGBT and HIV+ parents and their children**. Legally challenge adverse use of SO and HIV status in child custody and visitation decisions; fight attacks on 2nd parent adoptions and restrictions on parenting by lesbians and gay men; and fight for respect for adoptions and custody decisions rendered in other states, including cases in AL, AZ, CA, FL, GA, IL, LA, MI, MO, NC, NY, OH, VA, and WV.
4. Seek to further **protect gender-nonconforming and HIV+ adults and youth against discriminatory and unfair treatment**. Includes cases challenging termination of transgender inmates' hormone therapy in WI; seeking privacy protections regarding HIV status in CA, NY, and WI; challenging denial of care in medical and assisted living facilities based on HIV status in AR and WI; and challenging discriminatory handling of name change applications in NY. Advocate for improvements in federal anti-discrimination, travel and immigration, confidentiality and informed consent policies to protect people with HIV. Advocate for improved federal and state policies regarding identity documents and treatment of transgender individuals in prisons.
5. **Safeguard youth in schools and out-of-home care facilities** against harms based on their SO, GI or HIV status. Litigate (in CA, IN, and NY) and advocate (in GA, OR, and WA) based on rights to equal protection, freedom of expression, and freedom from violence and harassment. Work with GLSEN to support students' right to participate in "Day of Silence" educational activities. With National Association of Social Workers and Council on Social Work Education, educate and train providers in foster care, juvenile justice and homeless systems on rights of LGBT and HIV+ youth. Publish new toolkit to help teachers and school administrators strengthen policies and procedures to protect LGBTQ youth from harassment and discrimination.
6. **Reduce discriminatory and increase culturally-sensitive treatment in health care**. Litigate and engage in advocacy to protect LGBT and HIV+ patient autonomy and privacy; counter discriminatory denials of health care; and enable same-sex partner visitation and medical decision-making in US and in CA, FL, MT, NY, and WI. Publish report of our survey of 5,000+ LGBT people regarding their treatment by health care providers.

Key Accomplishments in FY2008

1. **Won cases** seeking marriage equality in CA; appealing trial court marriage equality victory in IA; defending NY recognition of same-sex couples' out-of-state marriages; defending domestic partner benefits in New Orleans, CA, and OH; and providing new rights for unmarried same-sex couples in CA and HI.
2. **Litigated cases (still pending):**
  - Seeking rights for unmarried same-sex couples in FL.
  - Challenging SO, GI and HIV-based employment discrimination in AZ, CA, DC, GA, IL, MA, NY, OR, TX, UT, and WA.
  - Challenging adverse use of SO in child custody/visitation decisions and fighting attacks on 2nd parent adoptions and restrictions on ability of lesbians and gay men to parent in CA, FL, GA, IL, LA, MD, MI, MO, NC, NY, OH, VA, and WA.
  - Challenging termination of hormone therapy to transgender inmates in WI; seeking equal access to courts for impoverished individuals seeking name changes in IL; and seeking appropriate treatment of transgender youth in foster care in NY.
  - Seeking to vindicate rights of LGBT youth to equal protection and freedom from violence and harassment in CA, MA, and NJ; to equal access to meet and express themselves on school campuses, and to a sound health curriculum in IN, MD, and NY.
3. **Engaged in public education, advocacy, and organizing** in support of:
  - Marriage equality in CA, IA, IL, NY and generally nationwide, and other means of protecting same-sex relationships in CA, IL, LA, MI, NJ, NY, VA, and WA.
  - 2nd annual "Clock in for Equality" organizing campaign and efforts toward change in State Department ban on hiring HIV+ Foreign Service employees.
  - Improved federal HIV anti-discrimination protections; adequate confidentiality protections in federally-funded HIV programs; sound HIV testing and informed consent policies; fair immigration policies regarding people with HIV; appropriate social security determinations for people with HIV; and appropriate treatment of transgender individuals in single-sex institutions.
  - Understanding of LGBT youth's rights at school in CA and FL and in foster care and juvenile justice systems.
  - Rights of LGBT and HIV+ people to patient autonomy and privacy; nondiscriminatory health insurance policies; and same-sex partner recognition for purposes of visitation and medical decision-making in CA, FL, IL, WA, and WI.
4. **Created and disseminated public education materials** on employment discrimination protections and translated our educational booklet, *Out at Work*, into Spanish. Revised and reprinted educational booklet for transgender youth entitled *Bending the Mold*. Revised and reprinted *Out, Safe and Respected*, a toolkit for LGBTQ youth in schools and held listening forums with LGBTQ youth in Chicago high schools.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

For the fiscal year ending October 31

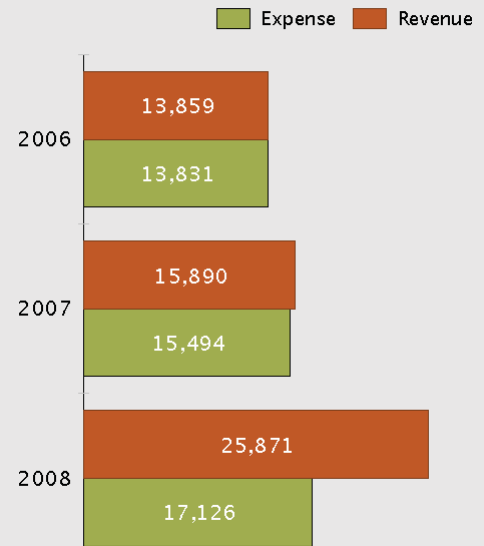
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	3.1	3.4	3.5
Days of working capital	73	85	108
Working capital (\$000)	\$2,082	\$2,558	\$3,458
Average daily cash expense (\$000)	\$28.5	\$30.2	\$32.1
Fundraising expense (cash only) to raise \$1	\$0.22	\$0.18	\$0.10
Total revenue raised through development efforts (\$000)	\$10,385	\$11,450	\$20,525

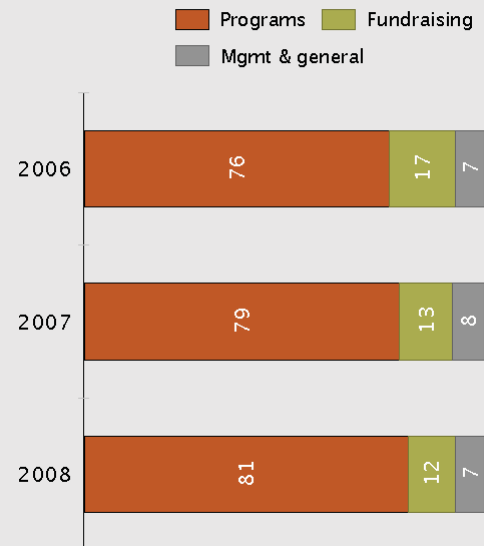
Indicators of Contributor Base

Number of individual donors who gave > \$35	14,254	14,520	13,944
Number of individual donors who gave > \$1,000	846	938	884
Donor turnover (gave > \$35 in prior FY & not this FY)	39%	37%	38%
Number of individuals attending fundraising events (paid > \$100 per person)	4,588	4,922	5,118
Percent of total revenue from top 10 contributors	21%	21%	21%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 137,360	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$386,067	\$449,782	\$322,292
Net cash provided (used) by operating activities	-133,702	105,792	-1,153,284
Net cash provided (used) by investing activities	59,827	-308,968	901,052
Net cash provided (used) by financing activities	137,590	75,686	148,803
Net increase (decrease) in cash	\$63,715	-\$127,490	-\$103,429
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$449,782</u>	<u>\$322,292</u>	<u>\$218,863</u>

**2009**

## Lambda Legal Defense

### Standard Annual Report

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10/9/2009

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$449,782		\$322,292		\$218,863
Investments	2,024,213		2,877,802		2,433,278
Other current assets	447,771		346,073		1,724,418
Net fixed assets	289,365		225,185		181,123
Other long-term assets	706,033		864,678		8,589,755
<b>Total Assets</b>	<b>\$3,917,164</b>		<b>\$4,636,030</b>		<b>\$13,147,437</b>
<b>Liabilities</b>					
Current liabilities	\$776,151		\$924,647		\$684,930
Long-term debt	0		0		0
Other long-term liabilities	468,874		643,073		648,864
<b>Total Liabilities</b>	<b>\$1,245,025</b>		<b>\$1,567,720</b>		<b>\$1,333,794</b>
<b>Net Assets</b>					
Unrestricted	2,477,460		2,792,240		2,161,536
Temporarily restricted	131,497		212,888		9,418,925
Permanently restricted	63,182		63,182		233,182
<b>Total Liabilities and Net Assets</b>	<b>\$3,917,164</b>		<b>\$4,636,030</b>		<b>\$13,147,437</b>

### Statement of Activities

	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$4,839,321	35%	\$5,155,886	32%	\$4,503,087	17%
Bequests	555,822	4%	958,941	6%	10,923,344	42%
Dues	0	0%	0	0%	0	0%
In-kind contributions	3,315,493	24%	4,357,589	27%	5,324,004	21%
Foundation contributions	1,574,273	11%	1,956,100	12%	1,661,137	6%
Corporate contributions/Non-event sponsorships	163,000	1%	109,123	1%	161,172	1%
Government funding	0	0%	0	0%	0	0%
Program income	40,641	0%	9,913	0%	80,582	0%
Fundraising event income	3,773,641	27%	3,881,302	24%	3,822,344	15%
Less costs of direct benefit to donors	-556,243	-4%	-641,491	-4%	-570,238	-2%
Net fundraising event income	\$3,217,398		\$3,239,811		\$3,252,106	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	146,087	1%	94,956	1%	-72,170	-0%
Other revenue	6,897	0%	7,716	0%	38,152	0%
<b>Total Revenue</b>	<b>\$13,858,932</b>		<b>\$15,890,035</b>		<b>\$25,871,414</b>	
<b>Expenses</b>						
Program services	7,150,056	52%	7,793,463	50%	8,524,422	50%
Fundraising	2,252,323	16%	2,024,743	13%	1,973,013	12%
Management and general	1,004,394	7%	1,206,796	8%	1,228,236	7%
Total cash expenses	\$10,406,773		\$11,025,002		\$11,725,671	
Non-cash expenses						
In-kind	3,315,493	24%	4,357,589	28%	5,324,004	31%
Depreciation	108,394	1%	111,273	1%	76,406	0%
Total non-cash expenses	\$3,423,887		\$4,468,862		\$5,400,410	
<b>Total Expenses</b>	<b>\$13,830,660</b>		<b>\$15,493,864</b>		<b>\$17,126,081</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$28,272</b>		<b>\$396,171</b>		<b>\$8,745,333</b>	

**2009**

**Lambda Legal Defense  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
32	56%	44%	0%	Board members required to make contributions to Lambda at a level that is meaningful to them.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
9%	10%	72%	9%	0%	0%

Lambda Legal Defense  
120 Wall St., Suite 1500  
New York, NY 10005  
212-809-8585  
www.lambdalegal.org

Additional Locations

Atlanta  
Chicago  
Dallas  
Los Angeles

**Senior Management Profile**

	Lowest	Average	Highest
Tenure with the organization	3.0	9.4	16.0
Compensation	\$125,089	\$167,241	\$238,545

Legal Names

Lambda Legal Defense and Education Fund - 501(c)(3)

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
84	84	0	57%	43%	4%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
15%	4%	64%	17%	0%	0%

Contact

Kevin Cathcart  
Executive Director  
kcathcart@lambdalegal.org

Note: Board and staff data as of 3/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- Working Capital** - Working capital (defined as cash and cash equivalents plus investments plus other current assets minus current liabilities) is further reduced by the amount of permanently restricted net assets held as current assets. Accordingly, permanently restricted net assets (\$63,182 in both FY2006 and FY2007 and \$233,182 in FY2008) have been removed from the investment balance in order to determine days of working capital and the liquidity ratio presented on page 3.
- In-kind Contributions and Expenses** - There are donated program services provided to Lambda Legal which are furnished by lawyers and other professionals who work under the supervision and guidance of Lambda Legal's staff members. These services are provided free of cost. The value of these services are recorded at fair market value as documented by the professionals providing them. They are recorded as in-kind contributions and are reflected in Lambda Legal's revenue and expense.
- Bequest** - Our bequest receivable consists of a generous bequest from the Estate of Ric Weiland. As of October 31, 2008, the net bequest receivable associated with this contribution amounted to approximately 89% of our total receivables. Equal quarterly disbursements of the Weiland Estate commenced in March of 2008 and are scheduled to continue of an eight year period. The net contribution amounts to approximately 39% of total revenues.



**2009**

**The LGBT Community Center - NYC**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1983	New York
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$8,066,937	77
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Provide a home for the birth, nurturing and celebration of our organizations, institutions, and culture; care for our individuals and groups in need; educate the public and our community; and empower our individuals and groups to achieve their fullest potential.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Make Center CARE Recovery, our licensed substance abuse treatment program, financially self-sufficient by reducing reliance on funding from NY State and increasing 3rd party reimbursements; increase the program's client census from 60 to 100.
2. Integrate and expand services for youth and families; access new funding streams for these services (e.g, NYS Office of Children's and Family Services).
3. Develop and implement a process for ongoing program evaluation tied to outcome measurement, assessment of real needs and real resources, return-on-investment analysis, and baseline long-term budgetary planning tool.
4. Develop integrated, agency-wide plan for increased services to LGBT immigrants, including community organizing, advocacy, social services, and cultural programming.
5. Plan and implement Workforce Development Program, including entry-level workforce skills-building classes, annual job fair for LGBT people, and mentoring programs for specific sectors.

One-year Key Planned Accomplishments for FY2010

1. Develop methods to begin making Center CARE Recovery financially self-sufficient by increasing 3rd-party reimbursements; build client census from 60 to 75 persons.
2. Conduct successful transition of new Executive Director and Director of Finance into the organization.
3. Enhance and expand comprehensive HIV prevention and education program for youth through additional revenue sources and increased training for YES staff.
4. Strategically enhance and expand services to LGBT immigrants, including community organizing and advocacy work, social services, and cultural programming.
5. Build capacity of Young Leaders Council through fundraising training; work toward its becoming a Junior Board that attracts younger constituencies.

Key Accomplishments in FY2009

1. Opened Center CARE Recovery, the 1st NYS licensed outpatient substance abuse treatment program developed specifically for LGBT persons.
2. Presented year-long series of activities and special event to celebrate Center's 25th anniversary.
3. Completed strategic needs assessment and strategic planning process that established goals and objectives for the organization's future.
4. Received new grant from NYS Department of Education to partner with 2 high schools to reduce dropout rates among LGBTQ youth.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

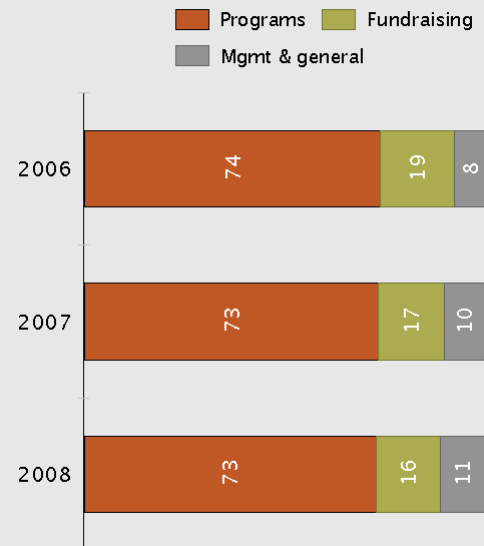
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.3	0.4	0.1
Days of working capital	69	55	13
Working capital (\$000)	\$1,173	\$1,081	\$324
Average daily cash expense (\$000)	\$17.0	\$19.6	\$24.4
Fundraising expense (cash only) to raise \$1	\$0.27	\$0.26	\$0.24
Total revenue raised through development efforts (\$000)	\$4,468	\$4,699	\$5,914
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	4,915	7,481	7,238
Number of individual donors who gave > \$1,000	261	332	277
Donor turnover (gave > \$35 in prior FY & not this FY)	38%	39%	19%
Number of individuals attending fundraising events (paid > \$100 per person)	1,462	1,733	1,430
Percent of total revenue from top 10 contributors	37%	12%	N/A
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 59,219	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$498,483	\$414,263	\$654,111
Net cash provided (used) by operating activities	-32,139	353,634	451,312
Net cash provided (used) by investing activities	-182,826	-60,685	-1,014,970
Net cash provided (used) by financing activities	130,745	-53,101	138,771
Net increase (decrease) in cash	-\$84,220	\$239,848	-\$424,887
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$414,263</u>	<u>\$654,111</u>	<u>\$229,224</u>

**2009**

**The LGBT Community Center - NYC**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$414,263		\$654,111		\$229,224
Investments	0		0		0
Other current assets	2,318,721		1,907,428		2,227,910
Net fixed assets	11,346,513		11,016,300		11,606,186
Other long-term assets	0		0		0
<b>Total Assets</b>	<b>\$14,079,497</b>		<b>\$13,577,839</b>		<b>\$14,063,320</b>
<b>Liabilities</b>					
Current liabilities	\$1,560,446		\$1,481,036		\$2,132,990
Long-term debt	1,456,587		1,395,358		1,329,703
Other long-term liabilities	4,461		4,461		4,461
<b>Total Liabilities</b>	<b>\$3,021,494</b>		<b>\$2,880,855</b>		<b>\$3,467,154</b>
<b>Net Assets</b>					
Unrestricted	10,391,810		9,971,776		9,541,486
Temporarily restricted	666,193		725,208		1,054,680
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$14,079,497</b>		<b>\$13,577,839</b>		<b>\$14,063,320</b>

**Statement of Activities**

	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$1,557,376	24%	\$1,415,010	20%	\$2,122,386	23%
Bequests	353,126	5%	176,706	2%	146,510	2%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	668,734	10%	563,005	8%	1,011,191	11%
Corporate contributions/Non-event sponsorships	180,500	3%	115,000	2%	135,000	1%
Government funding	2,112,140	32%	2,433,464	34%	3,938,555	43%
Program income	358,032	5%	437,067	6%	355,029	4%
Fundraising event income	1,225,836	19%	1,926,902	27%	1,481,781	16%
Less costs of direct benefit to donors	-256,742	-4%	-348,938	-5%	-360,949	-4%
Net fundraising event income	\$969,094		\$1,577,964		\$1,120,832	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	410,071	6%	459,287	6%	396,650	4%
<b>Total Revenue</b>	<b>\$6,609,073</b>		<b>\$7,177,503</b>		<b>\$9,226,153</b>	
<b>Expenses</b>						
Program services	4,512,045	69%	5,181,182	69%	6,453,708	69%
Fundraising	1,202,659	18%	1,229,762	16%	1,445,014	15%
Management and general	472,132	7%	736,680	10%	1,003,165	11%
Total cash expenses	\$6,186,836		\$7,147,624		\$8,901,887	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	370,822	6%	390,898	5%	425,084	5%
Total non-cash expenses	\$370,822		\$390,898		\$425,084	
<b>Total Expenses</b>	<b>\$6,557,658</b>		<b>\$7,538,522</b>		<b>\$9,326,971</b>	
Capital campaign net revenue	157,002		0		0	
<b>Change in Net Assets</b>	<b>\$208,417</b>		<b>-\$361,019</b>		<b>-\$100,818</b>	

**2009**

**The LGBT Community Center - NYC**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
20	75%	25%	5%	The requirement is customized based on means and ability but is fixed at a minimum of \$5,000 per board member.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
5%	0%	90%	5%	0%	0%

The LGBT Community Center - NYC  
 208 W. 13th St.  
 New York, NY 10011  
 212-620-7310  
 www.gaycenter.org

Additional Locations

None

Legal Names

**Senior Management Profile**

The Lesbian and Gay  
 Community Services Center,  
 Inc. - 501(c)(3)

Contact

Bruce Anderson  
 Interim Executive Director  
 bruce@gaycenter.org

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.0	6.6	11.0
Compensation	\$86,000	\$113,000	\$164,800

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
77	65	12	49%	51%	5%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
21%	8%	48%	22%	0%	1%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Long-term vs. Short-term Debt** - The Center carries long-term debt in the form of a mortgage on its building. The Center has no short-term debt.
- Top Contributors** - The Center's major donors contributed more than \$1,000,000 of revenue in FY2008.
- Liquidity Ratio** - More than 35% of the Center's operations are funded by reimbursable governmental grants. For these activities, the Center must first incur the expenses and it is subsequently reimbursed after submitting requests to the various government agencies.

2009

# Log Cabin Republicans

## Standard Annual Report

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### IMPORTANT NOTE TO THE READER

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

### Snapshot

<i>Founded</i>	<i>Geographic Scope</i>
1977	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,050,000	2
<i>Tax Status*</i>	
501(c)(3)	34%
501(c)(4)	66%

\* Percent of latest FY revenue.

### Mission

**Log Cabin Republicans** - Work within the Republican Party to advocate for equal rights for gay and lesbian Americans. We emphasize how our principles of limited government, individual liberty, individual responsibility, free markets, and a strong national defense - and the moral values on which they stand - are consistent with the pursuit of equal treatment under the law for gay and lesbian Americans.

**Liberty Education Forum** - Use the power of ideas to educate people about the importance of achieving freedom and fairness for all Americans, regardless of sexual orientation (SO) or gender identity (GI). LEF conducts educational programs, grassroots training, and research on a variety of key issues impacting the LGBT population.

### Key Planned Accomplishments

Five-year Key Planned Accomplishments for FY2009-2013

**Log Cabin Republicans**

1. Help secure bipartisan Congressional passage of federal hate crimes legislation, the Employment Non-Discrimination Act (ENDA) and the Uniting American Families Act (UAFSA), along with repeal of Don't Ask, Don't Tell (DADT)
2. Secure support of House and Senate Republicans for legislation to repeal DADT
3. Help secure bipartisan passage of LGBT legislation in 5 of these 6 states: IL (civil unions), NY (marriage equality), ME (marriage equality), MI (non-discrimination legislation), OH (non-discrimination legislation) and VA (non-discrimination legislation)
4. Grow membership base to 25,000
5. Grow the organization's annual operating budget to \$2.0 million, including a cash reserve of \$500,000 (with a portion added each year)
6. Advance our recently adopted Statement of Purpose:

Whereas, Log Cabin Republicans believe in **conservatism; balanced budgets and fiscal discipline; comprehensive tax reform; revitalizing Social Security; strong national defense; legal immigration reforms that are fair and humane; marriage equality for all Americans; broad, inclusive definition of family in America; non-discrimination in employment and market-driven health reform.** Resolved that the Log Cabin Board of Directors hereby asserts its commitment to these Republican principles as the guiding force behind the organization and its dedication to liberty and equality for all Americans.

Copies of the full document may be obtained by emailing Log Cabin Republican's DC Office Director, Christian Berle, at cberle@logcabin.org.

**Liberty Education Forum**

1. Develop a comprehensive multimedia website dedicated to educating the public about whether people choose their SO.
2. Provide grassroots training for 300 people annually on a variety of subjects that impart skills required to gain new allies for equality among conservatives and people of faith.
3. Engage 150 allies in outreach to gain new allies for equality by using mass media including newspaper op-eds and talk radio.
4. Produce 2 educational videos about LGBT issues aimed at gaining new allies among conservatives and people of faith. Increase the organization's annual budget to \$1.5 million including a reserve of \$25,000 (with a portion added each year).

**2009**

**Log Cabin Republicans**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

One-year Key Planned Accomplishments for FY2009

**Log Cabin Republicans**

1. Increase lobbying efforts in NY to push for a vote on marriage equality in the State Senate; raise \$75,000 for Log Cabin's NY State PAC to support fair-minded legislators
2. Assess and prioritize state ballot measures affecting the LGBT community and provide \$75,000 to defeat the most critical campaigns; support the No on One Campaign in Maine
3. Continue our fight to end DADT through our lawsuit against the Federal Government and Secretary of Defense

**Liberty Education Forum**

1. Conduct 10 educational seminars reaching 1,000 people aimed at gaining new allies among conservatives and people of faith
2. Distribute 10,000 copies of our new educational white paper examining whether SO is chosen
3. Work with allies to produce 8 pro-gay newspaper op-eds aimed at reaching conservatives and people of faith
4. Reach 100,000 conservatives and people of faith with online educational outreach

Key Accomplishments in FY2008

**Log Cabin Republicans**

1. Had a strong presence at the 2008 Republican National Convention, including an unprecedented welcome extended by the Republican National Committee and the McCain campaign. Log Cabin received convention credentials for the 1st time ever. Steve Schmidt, Chief Advisor to John McCain, addressed Log Cabin delegates and later spoke at our 2009 National Convention, making a strong case for the inclusion of gay and lesbian Americans in the Republican Party.
2. Continued to work to gain GOP support for ENDA, which passed the US House.
3. Lobbied and mobilized grassroots members to gain GOP support on hate crimes legislation. 25 House Republicans voted for the bill and 9 GOP senators provided the margin of victory for passage (versus our goal of 25 House Republican and 15 Senate Republican votes in favor).
4. Launched No on 8 Campaign in CA and raised \$50,000+ to target sympathetic Republican voters through Web ads and a website that featured prominent Republicans who agreed with our No position. Coordinated our efforts with the other No on 8 groups.
5. Conducted a poll of our members to determine who had served in the U.S. Military and shared this information with our allied organization. Joined Service Members United and other GOP groups to support a poll of Republican voters that showed solid progress on gay and lesbian issues. The poll generated significant media coverage, particularly stories about the Party's future and the need to return to core GOP principles.
6. Helped openly gay and lesbian Republicans gain appointment or win election to public office (e.g., Log Cabin member Brian Bates became the 1st openly-gay Republican elected to public office in GA after winning a city council seat in Doraville, and CA Governor Arnold Schwarzenegger appointed 10 Log Cabin members to state boards and commissions).

**Liberty Education Forum**

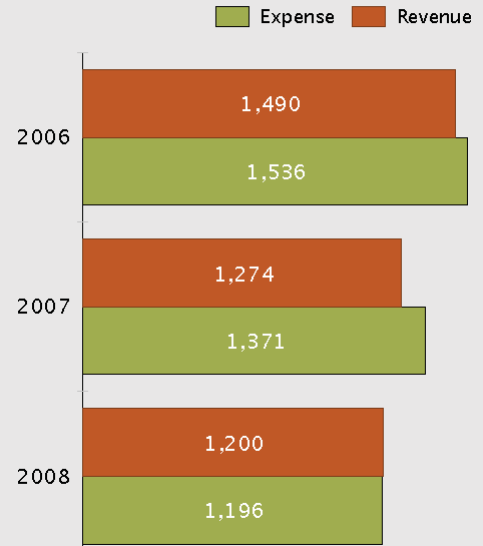
1. Conducted 10 educational seminars in target states to reach conservatives and people of faith.
2. Sponsored and helped organize *12,000 Flags for 12,000 Patriots*. This 11/07 event marked the 15th anniversary of the signing of DADT. The display of American flags on the National Mall received significant national news coverage about this important issue.
3. Produced new educational white paper examining whether SO is chosen. The report is being distributed to conservatives and people of faith.
4. Helped produce 6 op-eds in newspapers providing a conservative voice for equality.
5. The Liberty Education Forum National Symposium received national media coverage including an Associated Press story that ran in dozens of newspapers across the country.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

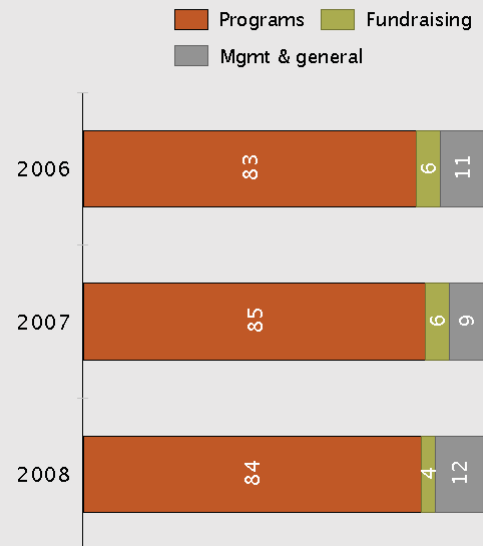
**Indicators of Financial Health & Efficiency**

For the fiscal year ending December 31

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	0.1	0.1	0.2
Days of working capital	-4	-30	-27
Working capital (\$000)	-\$18	-\$112	-\$90
Average daily cash expense (\$000)	\$4.2	\$3.7	\$3.3
Fundraising expense (cash only) to raise \$1	\$0.06	\$0.07	\$0.04
Total revenue raised through development efforts (\$000)	\$1,489	\$1,255	\$1,210

Indicators of Contributor Base

Number of individual donors who gave > \$35	518	503	476
Number of individual donors who gave > \$1,000	104	109	122
Donor turnover (gave > \$35 in prior FY & not this FY)	43%	36%	22%
Number of individuals attending fundraising events (paid > \$100 per person)	305	315	297
Percent of total revenue from top 10 contributors	35%	49%	40%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 19,746	

**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Unaudited 2008</u>
Cash and cash equivalent balance at beginning of year	\$96,694	\$13,505	\$23,151
Net cash provided (used) by operating activities	-79,772	-28,712	25,416
Net cash provided (used) by investing activities	-3,417	-1,142	-5,618
Net cash provided (used) by financing activities	0	39,500	-4,500
Net increase (decrease) in cash	-\$83,189	\$9,646	\$15,298
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$13,505</u>	<u>\$23,151</u>	<u>\$38,449</u>

**2009**

**Log Cabin Republicans  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Unaudited</i> 2008
<i>Assets</i>					
Cash and cash equivalents	\$13,505		\$23,151		\$38,449
Investments	0		0		0
Other current assets	108,627		232,564		66,052
Net fixed assets	12,295		10,467		12,581
Other long-term assets	6,567		6,567		6,567
<b>Total Assets</b>	<b>\$140,994</b>		<b>\$272,749</b>		<b>\$123,649</b>
<i>Liabilities</i>					
Current liabilities	\$139,900		\$368,161		\$194,148
Long-term debt	0		0		35,000
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$139,900</b>		<b>\$368,161</b>		<b>\$229,148</b>
<i>Net Assets</i>					
Unrestricted	-113,406		-208,912		-142,999
Temporarily restricted	114,500		113,500		37,500
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$140,994</b>		<b>\$272,749</b>		<b>\$123,649</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Unaudited</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$1,064,295	71%	\$662,420	52%	\$607,019	51%
Bequests	19,344	1%	19,200	2%	0	0%
Dues	102,444	7%	107,714	8%	6,108	1%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	96,990	7%	180,036	14%	191,464	16%
Corporate contributions/Non-event sponsorships	35,000	2%	110,000	9%	87,500	7%
Government funding	0	0%	0	0%	0	0%
Program income	170,925	11%	194,435	15%	317,476	26%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	592	0%	508	0%	-9,738	-1%
<b>Total Revenue</b>	<b>\$1,489,590</b>		<b>\$1,274,313</b>		<b>\$1,199,829</b>	
<i>Expenses</i>						
Program services	1,270,899	83%	1,166,838	85%	1,008,357	84%
Fundraising	91,960	6%	84,431	6%	42,636	4%
Management and general	167,567	11%	116,705	9%	145,429	12%
Total cash expenses	\$1,530,426		\$1,367,974		\$1,196,422	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	5,972	0%	2,845	0%	0	0%
Total non-cash expenses	\$5,972		\$2,845		\$0	
<b>Total Expenses</b>	<b>\$1,536,398</b>		<b>\$1,370,819</b>		<b>\$1,196,422</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$46,808</b>		<b>-\$96,506</b>		<b>\$3,407</b>	

2009

## Log Cabin Republicans Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>		Log Cabin Republicans 1050 Connecticut Ave. NW, Suite 500 Washington, DC 20036-5303 202-347-5306 www.logcabin.org
26	92%	8%	0%	LCR - \$7,500 (Give or Get) LEF - \$10,000 (Give)		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
0%	0%	100%	0%	0%	0%	<u>Additional Locations</u>  None
Senior Management Profile						<u>Legal Names</u>  Log Cabin Republicans - 501(c)(4)  Liberty Education Forum - 501(c)(3)
			<i>Lowest</i>	<i>Average</i>	<i>Highest</i>	
Tenure with the organization			3.0	4.3	6.0	
Compensation			\$60,000	\$85,625	\$142,500	
Paid Staff						<u>Contact</u>  Christian Berle Director cberle@logcabin.org
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	
2	2	0	100%	0%	0%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
0%	0%	100%	0%	0%	0%	
<p><i>Note: Board and staff data as of 2/28/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>						

### Organization's Notes and Advisories

1. **Liquidity and Days of Working Capital Ratios** - Log Cabin Republicans (LCR) and the Liberty Education Forum (LEF) receive several large contributions in the 1st quarter of each fiscal year. These gifts obviously wouldn't be reflected in the cash balance at the end of the previous fiscal year. This timing issue greatly affects our liquidity ratio and days of working capital.
2. **Board and Staff** - While Log Cabin Republicans and the Liberty Education Forum split certain staff and resources, they are overseen by 2 separate and independent Boards of Directors.
3. **Combined Financial Statements** - The financial statements in this report reflect the combined income and expenses of both LCR and the LEF. Individual financial statements for each entity are prepared in separate audit reports and are also presented in Combining Schedules which are available upon request.
4. **Financial Action Plan** - The staff and board of Log Cabin Republicans and Liberty Education Forum are making progress in putting both organizations in stronger financial positions. Given the financial challenges the whole nation is facing during these difficult times, the boards of both organizations have made significant commitments. We have moved our offices and downsized space to conserve resources. The boards have assumed many of the duties formerly assigned to staff. We have used consultants to save more funds.

#### Liberty Education Forum

1. The Liberty Education Forum has achieved financial stability by creating a balanced revenue mix between corporate support, major donors, foundation support, and board members. An 85% increase in foundation support for LEF in FY2007 allowed the organization to have positive change in net assets (surplus) for the 1st time since FY2003. FY2008 is on pace to be the most successful year financially for LEF since FY2000, increasing revenue by 20% and change in net assets by 400%.

**2009**

**Log Cabin Republicans**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Log Cabin Republicans**

1. LCR has made significant progress with reducing operating expenses in response to the difficult fundraising climate and the national recession. Even though overall donations decreased by 9% from FY2007 to FY2008, operating expenses were cut by 19% during the same period. This allowed LCR to show net revenues over expenses for the year.
2. A conscientious effort to attract new donors and to increase grassroots level support for LCR has resulted in a 39% increase in general membership donations from FY2007 to FY2008. Convention income and participation increased by 18% from the previous year.
3. LCR currently maintains a staff of one salaried employee in its Washington DC office, with two contractors. An active search continues to fill the position of Executive Director.
4. LCR continues to make progress in reducing liabilities. Between FY2007 and FY2008, LCR reduced its debt in excess of \$100,000. At the beginning of 2009 the organization had an obligation of \$99,000 to one single vendor which as of Aug 2009 has been reduced to \$7,000. All general accounts payables are current.
5. It is worth noting that LCR's monthly expenses for the first eight months of FY2009 are 60% lower than the same period in FY2008.

A significant reduction in operating expenses and a renewed fundraising and development effort have begun to turn LCR's financial situation around, although more work remains. The two Boards are committed to improving the fiscal picture and putting Log Cabin Republicans and the Liberty Education Forum on a solid financial footing.

**2009**

**MassEquality**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2001	Massachusetts & New England
<i>Fiscal Year</i>	<i>Type</i>
Oct - Sep	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,566,000	7
<i>Tax Status*</i>	
501(c)(3)	45%
501(c)(4)	55%
* Percent of latest FY revenue.	

**Mission**

MassEquality works to protect, promote and defend marriage equality and to advance lesbian, gay, bisexual and transgender rights.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Protect and promote marriage equality in MA through continued public education about the benefits of marriage equality for everyone and by maintaining a pro-equality supermajority in the state legislature.
2. Continue to collaborate with organizations like the Gay & Lesbian Advocates & Defenders (GLAD), Human Rights Campaign, Gill Action, National Gay & Lesbian Task Force (NGLTF), and statewide organizations to achieve, secure, and protect marriage equality in ME, RI, NJ, VT, CT, NH, and other states across the country.
3. Work to promote and protect full equality for the entire LGBT community in MA, including transgender equality, equality for LGBT youth and seniors, LGBT victims of domestic violence and HIV/AIDS treatment and prevention.
4. Ensure optimal funding levels for budget items that affect the LGBT community through lobbying and coordination with pro-equality allies in the legislature. Such programs include anti-bullying education, other programs for LGBT youth and seniors, programs for LGBT victims of domestic violence and those living with HIV/AIDS.

One-year Key Planned Accomplishments for FY2009

1. Introduce and advance a transgender civil rights bill, which will add gender identity and gender expression to MA's existing hate crimes legislation. Through lobbying and coordination with our legislative allies, MassEquality will work to secure broad-based, bipartisan support for this crucial bill.
2. Lobby the Registrar of Motor Vehicles in the Commonwealth to change regulations requiring proof of surgery to change one's gender on driver's licenses and other state-issued forms of identification. Achieve a policy allowing transgender persons to select the gender marker with which they identify.
3. Continue providing vital assistance to the efforts to secure or protect marriage equality in CT, VT, NH, RI, NJ and ME. In addition to providing guidance and expertise, MassEquality will offer substantive support, including but not limited to strategic planning, organizational development, organizing phone banks, fundraising, and providing in-state field assistance.
4. Support the messaging efforts in other battleground states by implementing a nationwide public relations campaign to spread the word that "marriage equality is good for families, good for society and good for the economy."
5. In MA, we will work to re-elect pro-equality legislators and challenge anti-equality incumbents and candidates, in order to preserve and expand our pro-equality majority in the Commonwealth.
6. Throughout New England, we will provide assistance and guidance, as needed, to states where pro-equality elected officials face anti-equality challengers.
7. Complete and publish *Winning Marriage Equality*, a best-practices manual for distribution among advocates of marriage-equality nationwide, which will also be available online.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

8. In coordination with Hattaway Communications, MassEquality will conduct a public education campaign around the fifth anniversary of marriage equality in MA. The campaign will focus on the results of several studies that reinforce the positive outcomes of marriage equality in MA. These studies will include:
  - A survey of MA voters, gauging state-wide support for marriage equality
  - A report on the economic benefits, to be conducted by the Williams Institute at UCLA, measuring the impacts of marriage equality on the Commonwealth's economy
  - A survey of same-sex couples, to be conducted by the MA Department of Public Health, exploring the effects of marriage on same-sex couples and their families
9. In addition to the publicity efforts of this project, MassEquality, in collaboration with Hattaway Communications, will conduct the following:
  - Create a website, [www.MarriageEqualityWorks.org](http://www.MarriageEqualityWorks.org), to catalogue the studies' findings, link visitors to media coverage and provide information for advocates and members of the media
  - Develop a Message Manual offering guidance for advocates across the country to tell the successful story of marriage in MA
  - Distribute an Editorial Package with the research data to writers and columnists nationwide
  - Send a Message Memo to commentators at top national media outlets, communications directors of progressive organizations, and consultants to national political leaders
  - Hold training webinars to brief equality organizations around the country on the message manual and advocacy tools available at [MarriageEqualityWorks.org](http://MarriageEqualityWorks.org)

Key Accomplishments in FY2008

1. Protected and promoted marriage equality in MA through public education about the benefits of marriage equality and supported re-election of pro-equality legislators, particularly those that switched their vote to support the 2007 legislative victory securing same-sex marriage. MassEquality protected seats held by pro-equality legislators and increased the pro-equality super majority in the MA legislature by an additional seat.
2. Repealed the 1913 law, which prevented out-of-state same-sex couples from marrying in MA. Governor Deval Patrick signed the repeal of this law on July 31, 2008.
3. Successfully lobbied for passage of the MassHealth Equality Bill to provide Medicaid access for same-sex married couples.
4. MassEquality joined forces with GLAD and state-wide organizations to support campaigns to secure marriage equality in CT and RI. Our work included the following:
  - Strategic planning consultancy, assisted in developing comprehensive, plans to win marriage equality
  - Supported and advanced electoral plans designed to grow pro-equality ranks in each state legislature
  - Helped to build robust state-wide field organizations to show every legislator that there is strong support for marriage equality in their districts
  - Raised funds from our major donors to assist the marriage equality campaigns in other states
  - Dedicated staff to work on site in CT
5. Successfully lobbied for significant funding increases for programs affecting the LGBT community; including youth, seniors, victims of domestic violence and HIV/AIDS treatment and prevention.
6. Built support and educated members about transgender non-discrimination rights, but did not gain sufficient support to pass a legislative bill.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

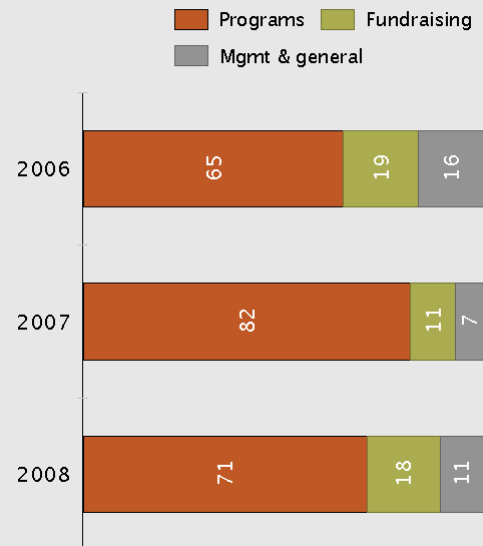
**Indicators of Financial Health & Efficiency**

For the fiscal year ending September 30

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	6.1	7.2	3.4
Days of working capital	115	45	84
Working capital (\$000)	\$638	\$443	\$375
Average daily cash expense (\$000)	\$5.5	\$9.8	\$4.5
Fundraising expense (cash only) to raise \$1	\$0.18	\$0.12	\$0.19
Total revenue raised through development efforts (\$000)	\$2,058	\$3,214	\$1,562

Indicators of Contributor Base

Number of individual donors who gave > \$35	3,482	5,213	1,646
Number of individual donors who gave > \$1,000	196	185	65
Donor turnover (gave > \$35 in prior FY & not this FY)	43%	56%	85%
Number of individuals attending fundraising events (paid > \$100 per person)	198	268	0
Percent of total revenue from top 10 contributors	48%	37%	63%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 187,000	

**Statement of Cash Flows**

	<u>Audited 2006*</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$482,266	\$622,331	\$480,406
Net cash provided (used) by operating activities	100,117	-129,452	-29,685
Net cash provided (used) by investing activities	-1,008	-12,473	0
Net cash provided (used) by financing activities	-7,134	0	0
Net increase (decrease) in cash	\$91,975	-\$141,925	-\$29,685
<b>Cash and Cash Equivalent Balances at End of Year</b>	<b>\$574,241</b>	<b>\$480,406</b>	<b>\$450,721</b>

\*Includes 501(c)(4) only

**2009**

**MassEquality**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006*</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$574,241		\$480,406		\$450,721
Investments	0		0		0
Other current assets	157,768		28,863		57,529
Net fixed assets	47,826		15,158		6,037
Other long-term assets	7,372		5,622		5,622
<b>Total Assets</b>	<b>\$787,207</b>		<b>\$530,049</b>		<b>\$519,909</b>
<b>Liabilities</b>					
Current liabilities	\$93,573		\$66,456		\$133,351
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$93,573</b>		<b>\$66,456</b>		<b>\$133,351</b>
<b>Net Assets</b>					
Unrestricted	658,634		463,593		386,558
Temporarily restricted	35,000		0		0
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$787,207</b>		<b>\$530,049</b>		<b>\$519,909</b>

**Statement of Activities**

	<i>Audited</i> <u>2006*</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$1,563,445	76%	\$2,610,267	81%	\$1,120,689	71%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	28,478	1%	18,267	1%	0	0%
Foundation contributions	0	0%	313,050	10%	298,650	19%
Corporate contributions/Non-event sponsorships	300,000	15%	100,107	3%	0	0%
Government funding	0	0%	0	0%	25,000	2%
Program income	0	0%	0	0%	0	0%
Fundraising event income	178,675	9%	186,586	6%	204,091	13%
Less costs of direct benefit to donors	-12,564	-1%	-13,995	-0%	-86,651	-6%
Net fundraising event income	\$166,111		\$172,591		\$117,440	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	5,604	0%	21,432	1%	8,598	1%
<b>Total Revenue</b>	<b>\$2,063,638</b>		<b>\$3,235,714</b>		<b>\$1,570,377</b>	
<b>Expenses</b>						
Program services	1,335,455	64%	2,952,003	81%	1,160,703	70%
Fundraising	368,001	18%	383,117	10%	300,025	18%
Management and general	319,312	15%	255,400	7%	177,562	11%
<b>Total cash expenses</b>	<b>\$2,022,768</b>		<b>\$3,590,520</b>		<b>\$1,638,290</b>	
Non-cash expenses						
In-kind	28,478	1%	18,267	0%	0	0%
Depreciation	40,862	2%	45,141	1%	9,122	1%
<b>Total non-cash expenses</b>	<b>\$69,340</b>		<b>\$63,408</b>		<b>\$9,122</b>	
<b>Total Expenses</b>	<b>\$2,092,108</b>		<b>\$3,653,928</b>		<b>\$1,647,412</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$28,470</b>		<b>-\$418,214</b>		<b>-\$77,035</b>	

\*Includes 501(c)(4) only

**2009**

**MassEquality**  
**Standard Annual Report**

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**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
21	48%	52%	0%	Raise no less than 8-10% of budgeted annual revenue. 100% of members expected to make a meaningful contribution themselves. Members make MassEquality one of their top 3 philanthropic priorities.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
10%	5%	85%	0%	0%	0%

MassEquality  
262 Washington Street,  
Seventh Floor  
Boston, MA 02108  
617-878-2300  
www.massequality.org

Additional Locations

None

Legal Names

MassEquality.org, The  
campaign for Equality.org,  
Inc. - 501(c)(4)

MassEquality Education Fund,  
Inc. - 501(c)(3)

Contact

Scott Gortikov  
Executive Director  
scottgortikov@massequality.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.8	2.2	3.5
Compensation	\$72,000	\$86,000	\$110,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
7	6	1	43%	57%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	100%	0%	0%	0%

*Note: Board and staff data as of 5/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

MassEquality realigned its mission in 2008 as a result of securing same sex marriage in the state of MA through the defeat of a discriminatory constitutional amendment in 2007. Through a subsequent strategic planning process, the organization broadened its mission from the single issue of same sex marriage in Massachusetts to the protection, promotion and defense of equal marriage and to the advancement of lesbian, gay, bisexual and transgender rights.

As a result of our mission realignment, significant changes have occurred with our contributor base. The number of individual donors has decreased as a result of moving from a grassroots equal marriage rights campaign that represented the primary civil rights issue in the country to a more mature leader on LGBT marriage and rights. Conversely, the percentage of revenue from the top 10 contributors has increased as the individual donor base has declined.



**2009**

**National Black Justice Coalition (NBJC)**

**Standard Annual Report**

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**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2003	National, CA, FL, MD, NJ
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$650,000	3
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Empower African American same-gender-loving (SGL)/LGBT people. NBJC works within our community and in concert with our allies for social justice and equality to end racism and homophobia.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Organizational Infrastructure and Capacity** - Build NBJC's internal administrative and fundraising infrastructure by adhering to our outcomes-focused action plan and creating development and personnel plans.
- HIV Education /Prevention** - Develop and implement strategies to encourage HIV prevention/education for Black gay men.
- Constituency Development** - Significantly increase paid membership and volunteer base. Develop programs to encourage civic participation, e.g., voter registration, policy advocacy, charitable giving to LGBT concerns and community development. Introduce social networking and additional interactivity to NBJC's website to increase membership and retention. Promote affiliate chapters each state.
- Programs and Services** - Increase understanding and tolerance of issues and concerns of Black SGL/LGBT individuals and communities. Specifically:
  - Technologically improve communications program and expand media relations efforts to increase local, state, and national visibility of Black SGL/LGBT individuals (measured by increases in # of openly-gay individuals in media, heightened media and community attention to violence and safety, and increases in # of NBJC subscribers, members, volunteers, donors).
  - Expand Religious Affairs programming and strengthen coalitions/partnerships with faith-based organizations and churches, such that NBJC is viewed as a leading advocate for religious tolerance and full integration of LGBT people of faith.
  - Expand NAACP initiatives and develop long-term project to obtain affirming LGBT resolutions by National Executive Board, Regional and State Chapters, and local chapters on e.g., marriage equality, employment discrimination, hate crimes and school bullying. Then spread success with NAACP to other mainstream Black civil rights groups.
  - Develop leadership training and development initiatives that increase # of openly-gay African Americans seeking public office, holding appointed office, and serving in leadership positions in political and policy campaigns.
- Youth-led Initiatives** - Include youth input and participation in all NBJC programming and develop youth-led initiatives that cause African American institutions that serve young people to increasingly focus on needs of all Black LGBT youth (from advantaged/gifted youth to homeless/at-risk youth facing physical and mental challenges). Strongly advocate for LGBT-inclusive state and federal anti-bullying laws.

**2009**

**National Black Justice Coalition (NBJC)**

**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

One-year Key Planned Accomplishments for FY2010

1. Via formal Development Plan, increase # of grants we submit, corporate sponsors we approach, major donors we secure, and individual members we recruit and maintain. Increase average size of major donors' gifts.
2. Persist in outreach efforts to encourage open and continuous conversations about homosexuality in African American faith communities. Challenge belief that homosexuality is sinful or immoral, using theological, scriptural and cultural knowledge and educational tools. Specifically:
  - Host *4th Black Church Summit*, coordinate "Faithful Call to Justice" and continue to build "Network."
  - Prepare regional southern "Religious Summit" in Charlotte, NC, by contacting/establishing dialog with affirming and Black churches and religious publications throughout the South.
  - Expand network of allied and African American SGL/LGBT faith leaders who provide leadership and public advocacy for equal justice for SGL/LGBT people.
3. Enhance capacity to communicate with diverse constituencies through more effective management of membership/donor databases and new communication strategies and tactics. Increase # of individuals reached by our publications and online communications by 10%. Increase distribution of online e-newsletters to 10,000 per edition and paid subscribers to 5,000.
4. Assist NAACP with their LGBT task force and execute passage of 5 affirming LGBT resolutions by NAACP local chapters in FL, TX, MD, and NY.

Key Accomplishments in FY2009

1. Developed and implemented Religious Affairs and Constituency Development Program to review and advise on religious issues/stances and plan religious summits. Published *Jumping the Broom* in MA, MD, CA. Convened 3rd *Black Church Summit* where 150 attendees were trained in NBJC's *Higher Ground: A Theological and Academic Analysis* curriculum. Orchestrated second *Faithful Call to Justice* program asking congregations of Black and Euro-American churches to acknowledge spiritual worth of GLBT brothers and sisters. Co-conducted and facilitated two day seminar with Center for Lesbians Studies and Religion to strategize on next steps for Black LGBT religious movement.
2. Held *Power of Us* National Convention attended by 200 people. Awards dinner hosted and recognized hosted Black LGBT elected officials from around the country.
3. In CA, published and distributed *Discrimination is not an Option* brochure to 250 African American households in partnership with NAACP; conducted 10-college/university *Stepping into History* tour that included 2-hour classes on marriage equality; gained inclusion of people-of-faith religious messaging in Prop 8 campaign.
4. In other states, co-sponsored Congressional Black Caucus Democratic Presidential Debate and hosted HIV/AIDS Testing and Awareness Day in NC; sponsored forums for college youth throughout MD.
5. Developed formal collaborations with Black AIDS Institute, NAACP, HRC, The Task Force, and GLAD. Partnered to develop and implement national "Coming Out" and "Know Your (HIV) Status" initiatives, achieving increased non-gay participation. Joined National Black Gay Men's Advocacy Coalition.
6. In media work, published 2 articles in NNPA network (serving African American communities) on innovative HIV/AIDS prevention methods and need to address homophobia; obtained 16-page *Power of Us* spread in *Clik Magazine* spotlighting achievements of Black LGBT people; unveiled *Power of Us* campaign in DC, NYC, LA, Philadelphia and Charlotte, spotlighting 30 diverse men, women, transgender, and youth.
7. To strengthen NBJC organization, increased paid membership and average member contribution (now \$35); implemented Board development and training plan, staff recruitment/professional development plan, and annual fundraising and development plan; sent 12 e-newsletters to our membership and daily e-newsletters during Black History Month and Kwanza; joined Internet social networks and forged relationships with Internet bloggers; produced and distributed *Welcome to NBJC* DVD detailing history, present and future of the organization; increased # of corporate sponsors and total revenue from individual donors.
8. Initiated and coordinated a "LIVE" syndicated radio broadcast of The Bev Smith show, an urban radio talk show syndicated through the American Urban Radio Network (AURN).
9. Created *At Crossroads* a qualitative and quantitative analysis of African-American attitudes, perceptions, and beliefs toward marriage equality.
10. Created *NBJC Annual Report* a narrative and financial report of NBJC's activities between 2006 and 2007.
11. Created *NBJC At a Glance* an overview of NBJC's work, a promotional flier for convention and tradeshow distribution.
12. Created NBJC branded bags for a promotional flier for convention and tradeshow distribution.
13. NBJC coordinated *Power of Us* fundraising events in DC, NYC, and Atlanta.
14. NBJC presented at a Ujima Retreat in Florida focused upon Black gay men.
15. NBJC co-sponsored a Washington, DC Town Hall focused on hate crimes.

**2009**

**National Black Justice Coalition (NBJC)**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

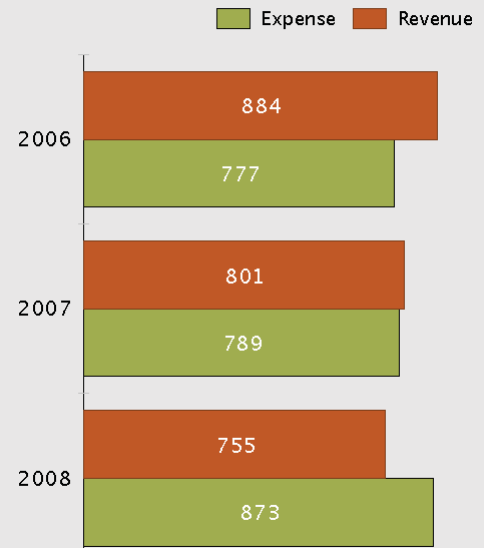
16. Shot, edited, produced and distributed the 40th Anniversary of Loving vs. Virginia landmark Supreme Court ruling public service video which parralled laws against interracial marriage to laws against same sex marriage.
17. Created the *Welcoming Congregations in the African American Tradition* which is useful tool to help clergy and congregations become comfortably welcoming and inclusive.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

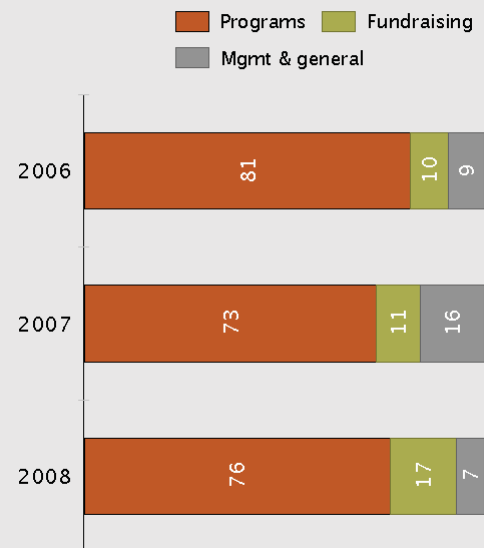
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	5.4	0.0	0.1
Days of working capital	44	45	-25
Working capital (\$000)	\$93	\$97	-\$59
Average daily cash expense (\$000)	\$2.1	\$2.2	\$2.4
Fundraising expense (cash only) to raise \$1	\$0.08	\$0.11	\$0.19
Total revenue raised through development efforts (\$000)	\$884	\$801	\$755
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	3,000	4,200	4,300
Number of individual donors who gave > \$1,000	10	20	15
Donor turnover (gave > \$35 in prior FY & not this FY)	9%	N/A	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	100	300	200
Percent of total revenue from top 10 contributors	27%	44%	33%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 6,500	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>N/A</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Unaudited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	N/A	\$112,199	\$0
Net cash provided (used) by operating activities	N/A	-209,333	10,828
Net cash provided (used) by investing activities	N/A	-1,257	0
Net cash provided (used) by financing activities	N/A	98,391	0
Net increase (decrease) in cash	N/A	-\$112,199	\$10,828
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>N/A</u>	<u>\$0</u>	<u>\$10,828</u>

**2009**

**National Black Justice Coalition (NBJC)**

**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Derivative</i> <u>2006</u>	<i>Audited</i> <u>2007</u>	<i>Unaudited</i> <u>2008</u>
<i>Assets</i>			
Cash and cash equivalents	\$112,199	\$0	\$10,828
Investments	0	0	0
Other current assets	1,035	199,413	16,044
Net fixed assets	0	8,448	0
Other long-term assets	0	7,500	7,500
<b>Total Assets</b>	<b>\$113,234</b>	<b>\$215,361</b>	<b>\$34,372</b>
<i>Liabilities</i>			
Current liabilities	\$20,599	\$102,848	\$85,529
Long-term debt	0	65,000	47,009
Other long-term liabilities	8,411	0	0
<b>Total Liabilities</b>	<b>\$29,010</b>	<b>\$167,848</b>	<b>\$132,538</b>
<i>Net Assets</i>			
Unrestricted	84,224	47,513	-98,166
Temporarily restricted	0	0	0
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$113,234</b>	<b>\$215,361</b>	<b>\$34,372</b>

**Statement of Activities**

	<i>Derivative</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Unaudited</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$286,260	32%	\$171,089	21%	\$226,319	30%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	597,500	68%	629,773	79%	432,258	57%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	96,179	13%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	0	0%	0	0%	0	0%
<b>Total Revenue</b>	<b>\$883,760</b>		<b>\$800,862</b>		<b>\$754,756</b>	
<i>Expenses</i>						
Program services	631,371	81%	575,143	73%	665,510	76%
Fundraising	73,863	10%	86,700	11%	144,144	17%
Management and general	71,883	9%	127,150	16%	62,868	7%
Total cash expenses	\$777,117		\$788,993		\$872,522	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	0	0%	0	0%	0	0%
Total non-cash expenses	\$0		\$0		\$0	
<b>Total Expenses</b>	<b>\$777,117</b>		<b>\$788,993</b>		<b>\$872,522</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$106,643</b>		<b>\$11,869</b>		<b>-\$117,766</b>	

**2009**

**National Black Justice Coalition (NBJC)**

**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
7	43%	57%	14%	5,000 give or get	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
100%	0%	0%	0%	0%	0%

**Locations & Contact**

National Black Justice Coalition (NBJC)  
1638 R St., NW, Suite 300  
Washington, DC 20009  
202-319-1552  
www.nbjc.org

Additional Locations

**Senior Management Profile**

	<u>Lowest</u>	<u>Average</u>	<u>Highest</u>
Tenure with the organization	1.0	3.0	5.0
Compensation	\$55,000	\$55,000	\$65,000

None

Legal Names

National Black Justice Coalition - 501(c)(3)

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
3	3	0	67%	33%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
100%	0%	0%	0%	0%	0%

Contact

Sharon Lettman  
Executive Director

*Note: Board and staff data as of 8/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Fiscal Sponsor** - The Astraea Foundation served as fiscal sponsor for NBJC from 7/1/04 to 7/30/06 and provided accounting services and financial reporting. On 3/1/06, NBJC began operations as an independent 501(c)(3) and took over responsibility for maintaining its books of account on - 7/1/06.
- Statement of Cash Flow** - Astraea Foundation did not prepare cash flow statements for sponsored projects, and therefore no statement of cash flows are presented for NBJC for FY2006.

2009

**National Center for Lesbian Rights (NCLR)**

**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1977	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Legal
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,555,500	22
<i>Tax Status*</i>	
501(c)(3)	92%
501(c)(4)	8%

\* Percent of latest FY revenue.

**Mission**

Advance the civil and human rights of LGBT people and families through litigation, policy advocacy and public education.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- Relationships & Parenting** - Eliminate section 3 of federal Defense of Marriage Act (DOMA) through litigation or legislation. Advocate to eliminate DOMA section 2 and to extend federal benefits to married same-sex couples through federal "certainty" provisions. Cause federal government to provide domestic partner benefits, including health insurance, to same-sex partners of federal employees. Expand # of states that provide equal legal protections for same-sex parents and their children regardless of marital/domestic partner (DP) status. Challenge anti-gay adoption measures and judicial precedents. Establish interstate recognition of LGBT parentage, adoption, and custody/visitation decrees. Advance marriage recognition in 1-2 states and create or protect DP protections in 3-5 states through legislation or litigation. Increase low-income LGBT families' access to legal information and services.
- Elders** - Litigate impact cases challenging discrimination. Promote policies requiring equal treatment in benefits, housing, assisted care and other services. Cause mainstream aging advocacy organizations to make their programs LGBT culturally competent. Educate LGBT elders about their rights including via *Planning with Purpose: Legal Basics for LGBT Elders* (NCLR, 2009).
- Youth** - Litigate impact cases challenging mistreatment in state care and provide technical assistance to attorneys representing LGBT youth in foster care or juvenile justice systems. Educate child welfare/juvenile justice providers, policymakers, lawyers and judges, including via dissemination of *Best Practice Guidelines for Treatment of LGBT Youth in State Care* (co-authored in 2006, now in 3rd printing), *Breaking the Silence: LGBT Foster Youth Tell Their Stories* (DVD of youth-produced stories + CD of NCLR training tools) and *Hidden Injustice: LGBT Youth in Juvenile Courts* (2009 final report of NCLR's 4-year Equity Project study). Assist in implementation of report recommendations, including work with juvenile courts in 1-2 jurisdictions serving as model sites. Release and disseminate guide for group homes working with transgender and gender nonconforming youth. Enact federal and state anti-discrimination policies and laws.
- Homophobia & Sporting Culture** - Litigate 2-3 cases of discrimination against an athlete or coach based on sexual orientation (SO) or gender identity (GI). Increase dialogue on pervasive homophobia in sports, including via annual conferences with NCAA on combating homophobia in sports and via educating policymakers and leading sports figures on hidden costs of homophobia and misogyny/consequences for LGBT athletes, sports professionals, and broader culture. Disseminate *The Positive Approach: Recognizing, Challenging, and Eliminating Negative Recruiting Based on Actual or Perceived Sexual Orientation*, and work to implement its model policy and recommendations for colleges and universities. Co-sponsor Think Tank on transgender issues in collegiate sports and issue report to pave the way for transgender student athletes.
- Transgender** - Litigate impact cases challenging discrimination against trans people in marriage, custody, employment, health care, prisons, and public accommodations. Help enact state and federal policies, regulations and laws and school district policies (in 2-3 districts) that protect transgender people. Ensure that transgender bias does not prevent justice in hate crimes cases, and provide expertise on transgender legal issues to media, policymakers, legislators, and trans individuals. Increase visibility and public awareness of transgender issues.
- Immigration & Asylum** - Represent immigrants seeking asylum based on SO- and/or GI-motivated persecution and violence in their countries of origin. Educate LGBT and broader public about harm from anti-immigration policies and real-life effects on couples and families. Work to end HIV travel ban and immigration discrimination against bi-national same-sex couples.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

One-year Key Planned Accomplishments for FY2009

1. Conduct targeted efforts to educate on marriage equality and to re-win freedom to marry in CA. Provide expert advice and legal information on availability and impact of marriage for same-sex couples in CA and other states. Continue leadership in advocating for protection of all family structures and non-marital children.
2. Assess opportunities to advance NM domestic partnership legislation and conduct marriage equality litigation in coming year. Complete legal arguments memo and identify TX law professor to assist advocacy for DP health insurance benefits for TX state university employees. Draft and/or support legislation to better protect children and diverse families in 3 states, including MD.
3. Strengthen LGBT protections in adoption and foster parenting, including: work to repeal FL adoption ban legislatively and develop new litigation strategies for protecting same-sex parents in meantime; assist NY Attorney General in case against Adoption.com for discriminating against same-sex couples; distribute litigation manual for attorneys defending 2nd-parent and DP adoptions in states that do not permit 2nd-parent adoptions; and win case requiring FL to recognize other states' 2nd-parent adoptions.
4. Work to enact new parenting law in DC to provide children born through artificial insemination (AI) with 2 immediately legal parents even when they are unmarried and to create presumption that DP or spouse of woman who gives birth through AI is child's parent.
5. Represent individuals in 2-3 impact cases involving SO or GI discrimination in sports, including Sulpizio and Bass v. Mesa Community College (now in active litigation). Advocate for 2-3 colleges/ universities and coaching/athletic associations to adopt recommended practices and model policy identified in NCLR's major new report on negative recruiting in sports.
6. Increase low-income, rural LGBT Californians' access to legal information and culturally competent legal services by expanding outreach and distribution of educational materials; litigate cases as needed on behalf of low-income LGBT residents of rural CA.
7. Identify areas where our expertise can be most useful now that there are opportunities to advance federal legislative and policy agenda, including trans-inclusive ENDA and efforts addressing family issues, federal prison conditions for transgender people, immigration, and equity in education.
8. Improve conditions for LGBT youth in juvenile justice/child welfare systems by: hosting 3-5 gatherings of stakeholder groups toward consensus plan for implementing recommendations in *Hidden Injustice*; publishing guide for group home administrators on meeting needs of transgender and gender nonconforming youth; training 1000 social workers, juvenile defense attorneys, judges, and other professionals on effectively working with LGBT youth in state care; and providing technical assistance to 5-10 defenders and advocates for LGBT clients.
9. Improve conditions for LGBT elders by: litigating 1-2 cases; presenting 10 workshops and conferences; and partnering with 5+ mainstream elder advocacy groups to raise awareness of LGBT elder needs and improve access. Release and disseminate (and then update based on feedback and changes in law) new publication to educate LGBT elders about their rights, *Planning with Purpose: Legal Basics for LGBT Elders*.
10. Improve conditions for LGBT immigrants and their families by: conducting 10 pro bono legal clinics; assisting past asylum clients with applications for employment authorization and permanent residence; representing 8-10 asylum clients; and increasing services, awareness, and visibility for LGBT immigrants.
11. Improve health care access for transgender prisoners by: following up 2007 victory in state prison case with settlement involving model new prison policies; and litigating Adams v. Bureau of Prisons on behalf of trans woman who is not receiving necessary medical treatment for GID.
12. Assist prosecutors in ensuring justice for transgender hate crimes victims and their families, and in reducing bias in trials utilizing state hate crimes law.

Key Accomplishments in FY2008

1. Won the landmark CA Supreme Court ruling on marriage rights, the 1st high court ruling ever that LGBT people are entitled to highest level of constitutional protection ("strict scrutiny"). Built momentum among allies for future work on marriage in CA by garnering diverse support in our Prop 8 challenge, the most heavily briefed case in CA history. Filed lawsuit (Strauss v. Horton) asking CA Supreme Court to invalidate Prop 8.
2. Won parenting rights and recognition cases in MD, KY, CA and FL. Co-drafted and advocated for a new parenting law in DC to protect children of same-sex couples who use artificial insemination.

**2009**

**National Center for Lesbian Rights (NCLR)**  
**Standard Annual Report**

Page 3  
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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. Won asylum for 5 LGBT individuals who had been persecuted based on SO or GI in their countries of origin.
4. Published LGBT practice recommendations for homeless youth agencies.
5. As amicus, won Sacramento Superior Court final decision affirming that CA nondiscrimination law protecting students is constitutional and dismissing challenge on all counts.
6. Filed lawsuit challenging constitutionality of federal Bureau of Prisons (BOP) policy prohibiting federal prisons from starting hormone treatment for prisoners with GID who were not receiving hormones when they entered prison.
7. Filed lawsuit against San Diego Mesa College for discrimination based on SO and GI and retaliation against former Head Coach of women's basketball team and former Director of Basketball Operations for repeatedly raising concerns about Title IX violations and unequal treatment of female athletes and faculty.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

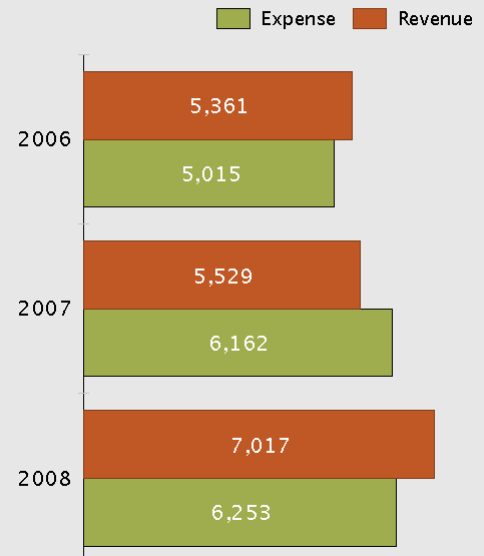
Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	5.2	3.2	7.9
Days of working capital	210	136	199
Working capital (\$000)	\$1,980	\$1,499	\$2,439
Average daily cash expense (\$000)	\$9.4	\$11.1	\$12.3
Fundraising expense (cash only) to raise \$1	\$0.19	\$0.30	\$0.14
Total revenue raised through development efforts (\$000)	\$3,414	\$3,123	\$5,256

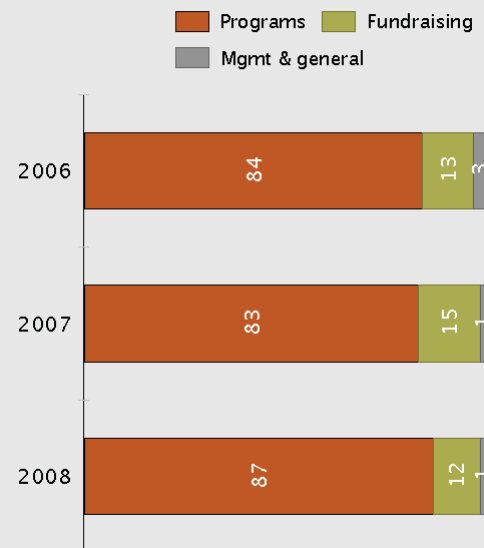
Indicators of Contributor Base

Number of individual donors who gave > \$35	2,244	2,009	2,835
Number of individual donors who gave > \$1,000	320	400	407
Donor turnover (gave > \$35 in prior FY & not this FY)	46%	44%	49%
Number of individuals attending fundraising events (paid > \$100 per person)	2,779	2,369	2,236
Percent of total revenue from top 10 contributors	22%	19%	37%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 17,043	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006*</u>	<u>Audited</u> <u>2007*</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$669,789	\$475,318	\$447,022
Net cash provided (used) by operating activities	-185,673	-316,868	822,186
Net cash provided (used) by investing activities	-8,798	188,572	-180,056
Net cash provided (used) by financing activities	0	100,000	-100,000
Net increase (decrease) in cash	-\$194,471	-\$28,296	\$542,130
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$475,318</u>	<u>\$447,022</u>	<u>\$989,152</u>

\* Includes 501(c)(3) only

**2009****National Center for Lesbian Rights (NCLR)****Standard Annual Report**Page 5  
10/9/2009*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview***Statement of Financial Position**

	<i>Audited</i> 2006*		<i>Audited</i> 2007*		<i>Audited</i> 2008
<b>Assets</b>					
Cash and cash equivalents	\$475,318		\$447,022		\$989,152
Investments	1,116,400		920,924		1,095,855
Other current assets	694,124		558,296		617,114
Net fixed assets	120,699		89,727		56,599
Other long-term assets	284,821		163,208		20,573
<b>Total Assets</b>	<b>\$2,691,362</b>		<b>\$2,179,177</b>		<b>\$2,779,293</b>
<b>Liabilities</b>					
Current liabilities	\$305,398		\$426,793		\$262,636
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$305,398</b>		<b>\$426,793</b>		<b>\$262,636</b>
<b>Net Assets</b>					
Unrestricted	1,484,445		976,927		1,657,327
Temporarily restricted	901,519		775,457		859,330
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$2,691,362</b>		<b>\$2,179,177</b>		<b>\$2,779,293</b>

**Statement of Activities**

	<i>Audited</i> 2006*		<i>Audited</i> 2007*		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$2,448,921	46%	\$1,987,190	36%	\$2,603,993	37%
Bequests	0	0%	0	0%	1,043,800	15%
Dues	0	0%	0	0%	0	0%
In-kind contributions	1,542,899	29%	2,090,930	38%	1,742,539	25%
Foundation contributions	639,375	12%	604,472	11%	995,000	14%
Corporate contributions/Non-event sponsorships	30,000	1%	10,000	0%	20,000	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	243,750	4%	14,655	0%
Fundraising event income	870,878	16%	693,704	13%	770,894	11%
Less costs of direct benefit to donors	-270,360	-5%	-172,575	-3%	-177,326	-3%
Net fundraising event income	\$600,518		\$521,129		\$593,568	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	74,130	1%	65,349	1%	-1,243	-0%
Other revenue	24,669	0%	5,681	0%	4,715	0%
<b>Total Revenue</b>	<b>\$5,360,512</b>		<b>\$5,528,501</b>		<b>\$7,017,027</b>	
<b>Expenses</b>						
Program services	2,653,589	53%	3,007,511	49%	3,679,321	59%
Fundraising	642,374	13%	949,634	15%	724,276	12%
Management and general	139,716	3%	76,130	1%	68,369	1%
Total cash expenses	\$3,435,679		\$4,033,275		\$4,471,966	
Non-cash expenses						
In-kind	1,542,899	31%	2,090,930	34%	1,742,539	28%
Depreciation	36,438	1%	37,876	1%	38,249	1%
Total non-cash expenses	\$1,579,337		\$2,128,806		\$1,780,788	
<b>Total Expenses</b>	<b>\$5,015,016</b>		<b>\$6,162,081</b>		<b>\$6,252,754</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$345,496</b>		<b>-\$633,580</b>		<b>\$764,273</b>	

\* Includes 501(c)(3) only

**2009**

**National Center for Lesbian Rights (NCLR)  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
13	0%	100%	0%	Board members are expected to be part of the major donor campaign and all aspects of the annual fundraising campaign.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
23%	15%	31%	31%	0%	8%

National Center for Lesbian Rights (NCLR)  
870 Market St., Suite 370  
San Francisco, CA 94102  
415-392-6257  
www.nclrights.org

Additional Locations

Los Angeles  
St. Petersburg  
Washington DC

**Senior Management Profile**

Legal Names

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	3.5	9.8	16.0
Compensation	\$85,500	\$139,625	\$205,000

National Center for Lesbian Rights - 501(c)(3)  
National Center for Lesbian Rights Social Justice Fund - 501(c)(4)

**Paid Staff**

Contact

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
22	20	2	18%	82%	9%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	14%	68%	18%	0%	0%

Kate Kendell  
Executive Director  
kkendell@nclrights.org

*Note: Board and staff data as of 6/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

NCLR's FY2008 expenses included \$1,742,539 in donated legal services from cooperating counsel in a # of cases on our docket. The depth and breadth of the cases we are involved in would be impossible without private attorneys and law firms who donate pro bono legal services to our clients.

**2009 National Center for Transgender Equality (NCTE)**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2003	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$500,000	4
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

End discrimination and violence against transgender people through education and advocacy on national issues of importance to transgender people. By empowering transgender people and our allies to educate and influence policymakers and others, NCTE facilitates a strong and clear voice for transgender equality in our nation's capital and around the country.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Modify federal and state policies to allow transgender people to obtain accurate identification documents.
2. Eliminate anti-transgender discriminatory policies from both private and public health insurance programs.
3. Modify the policies of 10+ federal agencies to diminish anti-transgender discrimination.
4. Enact federal legislation to outlaw transgender employment discrimination and to combat hate crimes based on gender identity.
5. Grow staff from 3 to 8 and budget from \$380,000 to \$800,000.

One-year Key Planned Accomplishments for FY2009

1. Co-coordinate national convening of 15 to 20 transgender leaders and strategists to strengthen the transgender movement.
2. Modify 5+ major federal policies/administrative practices to diminish anti-transgender discrimination.
3. Enact federal legislation to outlaw transgender employment discrimination and to combat hate crimes based on gender identity.
4. Make Community Education & Outreach position full-time and add policy position.
5. Grow staff from 3 to 5 and budget from \$380,000 to \$500,000.

Key Accomplishments in FY2008

1. Created federal agenda that comprehensively maps policies of every federal agency that discriminates against or fails to reflect the needs and experiences of trans people; agenda prescribes remedies for each policy.
2. Coordinated national coalition of LGBT and allied groups that sparked 40 to 50 grassroots action teams to advance LGBT rights.
3. Launched 1st academically sound national survey on prevalence of anti-transgender discrimination in US and collected 6,500 responses, well in excess of goal (2,000).
4. Conducted 3 working conferences of transgender and allied activists on religious organizing, healthcare access, and federal policies.
5. Upgraded membership management software and other internal technology systems to match organizational growth.
6. Gained 11 new large and/or corporate donors.

# 2009 National Center for Transgender Equality (NCTE) Standard Annual Report

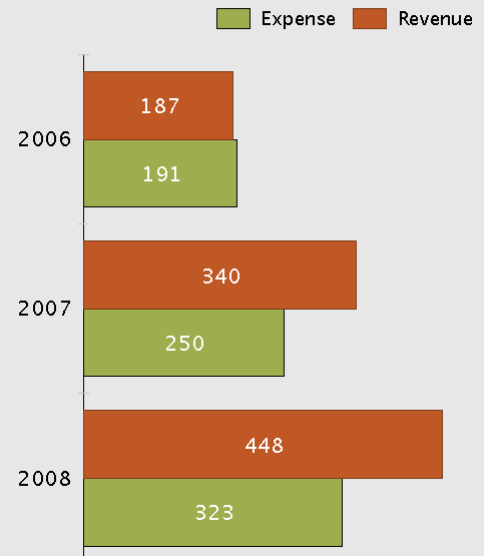
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

## Indicators of Financial Health & Efficiency

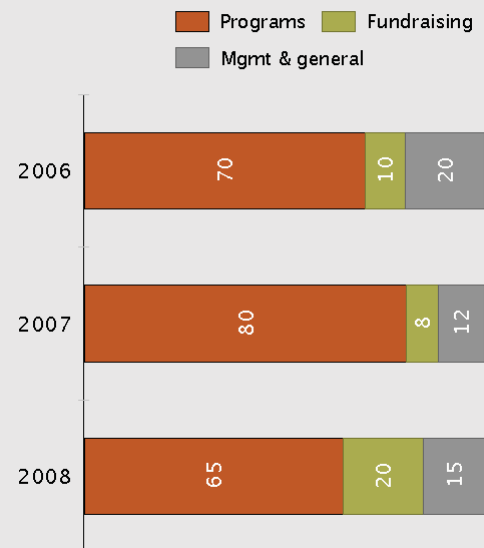
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	N/A	40.0	51.2
Days of working capital	48	168	186
Working capital (\$000)	\$25	\$114	\$163
Average daily cash expense (\$000)	\$0.5	\$0.7	\$0.9
Fundraising expense (cash only) to raise \$1	\$0.10	\$0.06	\$0.14
Total revenue raised through development efforts (\$000)	\$187	\$340	\$446
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	225	354	375
Number of individual donors who gave > \$1,000	20	19	21
Donor turnover (gave > \$35 in prior FY & not this FY)	47%	24%	54%
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	203
Percent of total revenue from top 10 contributors	73%	63%	44%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 4,807	

### Revenue -vs- Expense (\$000)



### Expense Percentage



## Statement of Cash Flows

	<u>Unaudited</u> 2006	<u>Unaudited</u> 2007	<u>Reviewed</u> 2008
Cash and cash equivalent balance at beginning of year	\$26,685	\$24,805	\$68,088
Net cash provided (used) by operating activities	-1,880	51,811	-2,315
Net cash provided (used) by investing activities	0	-8,528	0
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>-\$1,880</u>	<u>\$43,283</u>	<u>-\$2,315</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$24,805</u>	<u>\$68,088</u>	<u>\$65,773</u>

**2009 National Center for Transgender Equality (NCTE)**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Unaudited</i> 2006	<i>Unaudited</i> 2007	<i>Reviewed</i> 2008
<i>Assets</i>			
Cash and cash equivalents	\$24,805	\$68,088	\$65,773
Investments	0	0	0
Other current assets	0	47,803	98,747
Net fixed assets	2,775	3,754	1,816
Other long-term assets	0	0	78,360
<b>Total Assets</b>	<b>\$27,580</b>	<b>\$119,645</b>	<b>\$244,696</b>
<i>Liabilities</i>			
Current liabilities	\$0	\$1,701	\$1,285
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
Total Liabilities	\$0	\$1,701	\$1,285
<i>Net Assets</i>			
Unrestricted	27,580	117,944	86,461
Temporarily restricted	0	0	156,950
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$27,580</b>	<b>\$119,645</b>	<b>\$244,696</b>

**Statement of Activities**

	<i>Unaudited</i> 2006		<i>Unaudited</i> 2007		<i>Reviewed</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$65,206	35%	\$89,024	26%	\$71,585	16%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	1,500	0%
Foundation contributions	122,000	65%	250,596	74%	325,160	73%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	2,550	1%
Fundraising event income	0	0%	5,275	2%	53,975	12%
Less costs of direct benefit to donors	0	0%	-4,761	-1%	-6,390	-1%
Net fundraising event income	\$0		\$514		\$47,585	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	0	0%	102	0%	0	0%
Total Revenue	<b>\$187,206</b>		<b>\$340,236</b>		<b>\$448,380</b>	
<i>Expenses</i>						
Program services	132,754	69%	199,517	80%	207,542	64%
Fundraising	18,981	10%	20,003	8%	62,226	19%
Management and general	37,351	20%	28,929	12%	49,708	15%
Total cash expenses	\$189,086		\$248,449		\$319,476	
Non-cash expenses						
In-kind	0	0%	0	0%	1,500	0%
Depreciation	2,147	1%	1,746	1%	1,937	1%
Total non-cash expenses	\$2,147		\$1,746		\$3,437	
Total Expenses	<b>\$191,233</b>		<b>\$250,195</b>		<b>\$322,913</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$4,027</b>		<b>\$90,041</b>		<b>\$125,467</b>	

**2009 National Center for Transgender Equality (NCTE)  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
7	29%	71%	86%	Minimum \$1,500 give or get	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
14%	0%	86%	0%	0%	0%

**Locations & Contact**

National Center for Transgender Equality (NCTE)  
1325 Massachusetts Ave.  
Suite 700  
Washington, DC 20005  
202-903-0112  
www.nctequality.org

Additional Locations

None

Legal Names

National Center for Transgender Equality - 501(c)(3)

Contact

Mara Keisling  
Executive Director  
mkeisling@nctequality.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.1	2.8	5.5
Compensation	\$55,000	\$65,100	\$85,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
4	4	0	25%	75%	75%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	100%	0%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

The National Center for Transgender Equality is proud to have celebrated its Five Year Anniversary in December 2008. For more information about NCTE, contact our offices or visit our website at [www.nctequality.org](http://www.nctequality.org).

**2009**

**National Stonewall Democrats**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2000	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$500,000	5
<i>Tax Status*</i>	
501(c)(3)	0%
501(c)(4)	100%
527 PAC	0%
Federal PAC	0%
Non-federal PAC	0%

**Mission**

Elect pro-equality Democrats and advocate for issues important to the LGBT community and our allies within the Democratic Party. National Stonewall Democrats (NSD) is the nation's only grassroots organization of LGBT and allied Democrats, with more than 120 local chapters and LGBT Democratic clubs across the nation.

*\* Percent of latest FY revenue.*

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- Utilize our grassroots infrastructure to play in Democratic primary races and secure nomination of the most pro-equality candidates, and build coalitions with traditionally Democratic constituency groups to build new alliances for the LGBT community and expand support among current allied communities for LGBT equality.
- Diversify our funding sources while reducing the portion of the budget coming from the top 10 donors.
- Expand staff to 10.
- Initiate chapters and LGBT Democratic clubs in every state from 43 plus the District of Columbia, currently, to all 50 plus the District of Columbia and Puerto Rico.
- Grow dues-paid membership from 6,400 to 12,800.

One-year Key Planned Accomplishments for FY2009

- Launch our Grassroots IPO to raise funds and pre-book income for the following year to reinvest in strategic elections and advocacy work through local chapters.
- Publish the "State Party Report Card" to hold state political parties accountable on inclusion of and outreach to the LGBT community and their allies.
- Launch the Leadership Council of chapter representatives to bring important issues to the attention of the board of directors and shape the development of chapter services.
- Create a \$50,000 reserve in our PAC to make early investments in the campaigns of pro-equality Democratic candidates in the 2010 midterm elections.
- Create a "Coming Out As A Young Democrat" resource guide to put in the hands of LGBT young Democrats to build our bench among the next generation of leadership.

Key Accomplishments in FY2008

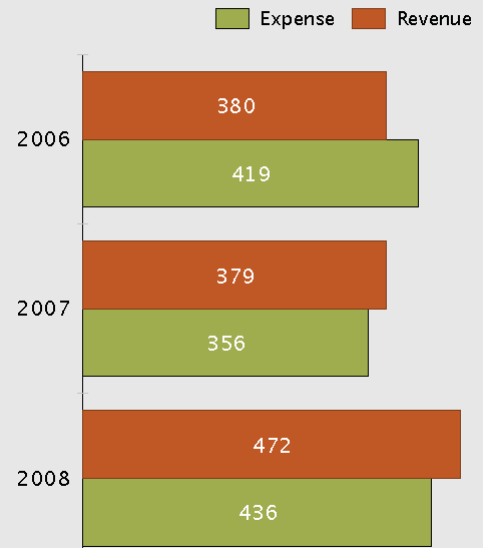
- NSD invested in 28 races across the US; local chapters supported hundreds more races.
- Expanded our national chapter network by 33% from 90 to 120 chapters.
- NSD raised \$100,000+ (nearly \$70,000 online) directly for pro-equality candidates, along with \$50,000+ via the NSDPAC. Local chapters raised additional funds.
- Sent a record 375 LGBT participants to the Democratic National Convention, nearly 33% more than in 2004.
- Created a competitive granting process to fund chapter work.
- Overhauled our organizational structure to put grassroots leadership at the forefront and channel more resources to support chapter work.
- Organized a national transgender blogger day of action that raised \$16,000+ for Barack Obama.
- Upgraded our technology to improve chapter services.
- Submitted national testimony on LGBT issues.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

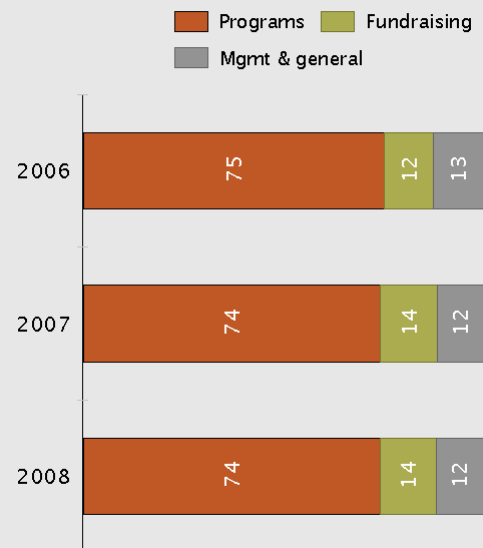
**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	0.3	1.5	3.6
Days of working capital	-1	22	43
Working capital (\$000)	-\$1	\$22	\$52
Average daily cash expense (\$000)	\$1.1	\$1.0	\$1.2
Fundraising expense (cash only) to raise \$1	\$0.15	\$0.14	\$0.13
Total revenue raised through development efforts (\$000)	\$341	\$364	\$452

Indicators of Contributor Base

Number of individual donors who gave > \$35	273	390	904
Number of individual donors who gave > \$1,000	6	24	78
Donor turnover (gave > \$35 in prior FY & not this FY)	50%	76%	36%
Number of individuals attending fundraising events (paid > \$100 per person)	155	126	137
Percent of total revenue from top 10 contributors	34%	32%	58%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 64,141	

**Statement of Cash Flows**

	<u>Unaudited 2006</u>	<u>Unaudited 2007</u>	<u>Unaudited 2008</u>
Cash and cash equivalent balance at beginning of year	\$13,045	\$4,395	\$39,548
Net cash provided (used) by operating activities	-8,650	35,153	18,806
Net cash provided (used) by investing activities	0	0	0
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>-\$8,650</u>	<u>\$35,153</u>	<u>\$18,806</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u><u>\$4,395</u></u>	<u><u>\$39,548</u></u>	<u><u>\$58,354</u></u>

**2009**

**National Stonewall Democrats**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Unaudited</i> <u>2006</u>		<i>Unaudited</i> <u>2007</u>		<i>Unaudited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$4,395		\$39,548		\$58,354
Investments	0		0		0
Other current assets	9,061		9,002		9,350
Net fixed assets	1,399		813		545
Other long-term assets	0		0		0
<b>Total Assets</b>	<b>\$14,855</b>		<b>\$49,363</b>		<b>\$68,249</b>
<b>Liabilities</b>					
Current liabilities	\$14,887		\$26,640		\$16,191
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$14,887</b>		<b>\$26,640</b>		<b>\$16,191</b>
<b>Net Assets</b>					
Unrestricted	-32		-14,414		52,058
Temporarily restricted	0		37,137		0
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$14,855</b>		<b>\$49,363</b>		<b>\$68,249</b>

**Statement of Activities**

	<i>Unaudited</i> <u>2006</u>		<i>Unaudited</i> <u>2007</u>		<i>Unaudited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$122,553	32%	\$292,625	77%	\$359,394	76%
Bequests	0	0%	0	0%	0	0%
Dues	38,815	10%	13,047	3%	17,374	4%
In-kind contributions	0	0%	0	0%	3,080	1%
Foundation contributions	0	0%	0	0%	0	0%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	75,478	16%
Government funding	0	0%	0	0%	0	0%
Program income	54,363	14%	1,800	0%	0	0%
Fundraising event income	163,869	43%	71,458	19%	13,620	3%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$163,869		\$71,458		\$13,620	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	0	0%	0	0%	2,620	1%
<b>Total Revenue</b>	<b>\$379,600</b>		<b>\$378,930</b>		<b>\$471,566</b>	
<b>Expenses</b>						
Program services	315,289	75%	263,886	74%	322,401	74%
Fundraising	51,377	12%	50,238	14%	57,915	13%
Management and general	50,398	12%	41,465	12%	52,281	12%
Total cash expenses	\$417,064		\$355,589		\$432,597	
Non-cash expenses						
In-kind	0	0%	0	0%	3,080	1%
Depreciation	2,052	0%	586	0%	269	0%
Total non-cash expenses	\$2,052		\$586		\$3,349	
<b>Total Expenses</b>	<b>\$419,116</b>		<b>\$356,175</b>		<b>\$435,946</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$39,516</b>		<b>\$22,755</b>		<b>\$35,620</b>	

**2009**

**National Stonewall Democrats  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
Total	Male	Female	Transgender	Fundraising Requirements		National Stonewall Democrats 1325 Massachusetts Ave. NW Suite 700 Washington, DC 20005 202-625-1382 www.stonewalldemocrats.org
11	73%	27%	9%	\$10,000 per year		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
9%	0%	64%	18%	0%	9%	<u>Additional Locations</u>
Senior Management Profile						Atlanta
			<u>Lowest</u>	<u>Average</u>	<u>Highest</u>	<u>Legal Names</u>
Tenure with the organization			1.0	4.0	9.0	National Stonewall Democrats - 501(c)(4)
Compensation			\$50,000	\$56,667	\$70,000	National Stonewall Democrats PAC - Federal PAC
Paid Staff						National Stonewall Democrats PAC - Non-federal PAC
Total	Full-Time	Part-Time	Male	Female	Transgender	Stonewall Democrats United - 527 PAC
5	4	1	80%	20%	0%	Stonewall Democrats Fund - 501(c)(3)
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	<u>Contact</u>
20%	0%	80%	0%	0%	0%	Kyle Bailey Interim Executive Director kbailey@stonewalldemocrats.org

*Note: Board and staff data as of 4/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Liquidity Ratio and Working Capital** - National Stonewall Democrats cash-on-hand and Days of Working Capital increased substantially from FY2007 to FY2008 due to a renewed focus on fundraising with the hiring of a new Director of Chapter and National Development. Those funds were generally raised to support chapter-building, strategic elections work, and to increase LGBT participation in party affairs, including delegates to the Democratic National Convention.
- Revenue Raised Through Development Efforts** - Our revenue has raised consistently over the past 3 years and with the hiring of a Director of Chapter and National Development, we expect to see those numbers continue to increase.
- Emergency Reserves** - At the end of FY2007 National Stonewall Democrats Board of Directors voted to reserve 5% of its annual operating revenues as an emergency reserve. The emergency reserve was voted to begin with the FY2008 budget year. The organization has a budget surplus.
- Fundraising Expenses** - Our fundraising expenses remained consistent year-to-year from FY2007 to FY2008. (Our fundraising expenses are beating industry standards by efficiently controlling costs.)
- Donor Turnover** - National Stonewall Democrats typically has a bifurcated membership base. A group of donors are long-term loyal members while the other group connects with National Stonewall Democrats on a short-term targeted campaign. With the hiring of a new Executive Director at the end of FY2007 and a Director of Chapter and National Development in June 2008, our donor turnover rate decreased through specific attempts to retain more of the short-term donors and convert them into long-term members.

**2009**

**National Youth Advocacy Coalition (NYAC)**

**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1993	National
<i>Fiscal Year</i>	<i>Type</i>
Apr - Mar	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$628,000	5
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Advocate for and with young LGBTQ people to end discrimination against these youth and to ensure their physical and emotional well-being. Celebrating its 16th anniversary, NYAC supports and builds the capacity of local, state and national organizations that engage LGBTQ youth and represents the voices of young people – the largest living generation – within broader LGBTQ and social justice movements. Through capacity building, advocacy and youth engagement, NYAC is building a generation of impact.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Create NYAC Network to give members access to additional and more personalized capacity building and technical assistance. Recruit local, state and national organizations to the Network.
2. Build more community support to ensure adequate services and leadership opportunities for LGBTQ young people.
3. Advocate for and with youth to ensure that they and their issues are fully integrated into the LGBTQ movement.
4. Maintain NYAC's social justice values and engage youth in working for social change.
5. Diversify NYAC's funding base to ensure long-term sustainability.

One-year Key Planned Accomplishments for FY2010

1. Continue the national release of *You Know Different*, our youth HIV social marketing campaign proven to increase HIV testing among youth of color when implemented at the local level. Develop a new social marketing campaign to reach and increase HIV testing rates among Latino/a youth.
2. Coordinate a national LGBTQI Young Adult Tobacco Working Group that will create a needs assessment survey tool for nationwide distribution. Compile and disseminate survey findings and associated program and policy recommendations for tobacco prevention and cessation.
3. Continue to create opportunities for youth-adult partnerships on issues important to the larger LGBTQ communities.
4. Provide resources, materials, capacity building services, and opportunities to partner with NYAC on important issues that impact the well-being of youth to 2,500 local, state and national organizations working with LGBTQ youth. This year, particular emphasis on resources to help organizations survive the economic crisis. Creation of NYAC Network to develop strategic relationships with more in-depth capacity building and technical assistance with at least 75 of these organizations by the end of FY10.
5. Increase current annual revenue from individual donors by at least 15%.

Key Accomplishments in FY2009

1. Developed and released a transgender (MTF) image to enable NYAC's ongoing *You Know Different* social marketing campaign to reach the transgender community.

**2009**

**National Youth Advocacy Coalition (NYAC)**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

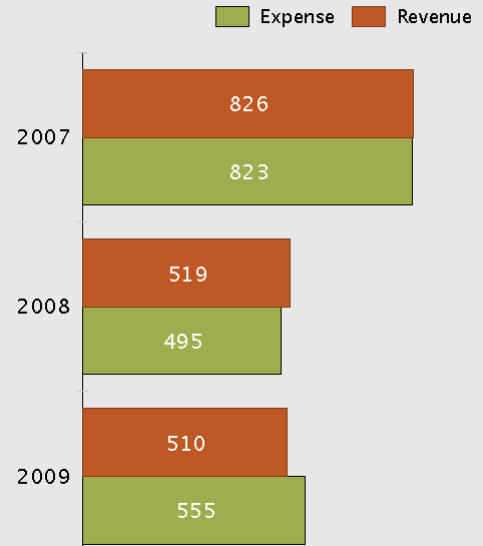
2. Promoted the creation of safe spaces for LGBTQ youth by providing organizations, teachers, and individuals with Safe Zone posters and stickers for offices and classrooms.
3. Created opportunities for youth and adult conversation/partnership on LGBT civil rights issues by serving on several national public policy coalitions and direct service task forces and providing trainings to local, state and national organizations and government entities on establishing effective local youth-adult partnerships.
4. Offered a popular webinar series to build the capacity of organizations working with LGBTQ youth and disseminated associated materials and resources utilizing both electronic and traditional mediums.
5. Continued to make strides toward increased annual revenue by increasing giving of current major donors and identifying strategies to engage and re-engage individual donors. Developed a development system which moving forward allows the organization to better harness fundraising strategies successfully utilized by politicians during the 2008 election.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending March 31		
	2007	2008	2009
Liquidity ratio	0.3	0.3	0.2
Days of working capital	3	28	-6
Working capital (\$000)	\$7	\$38	-\$9
Average daily cash expense (\$000)	\$2.2	\$1.3	\$1.5
Fundraising expense (cash only) to raise \$1	\$0.02	\$0.02	\$0.01
Total revenue raised through development efforts (\$000)	\$796	\$428	\$448

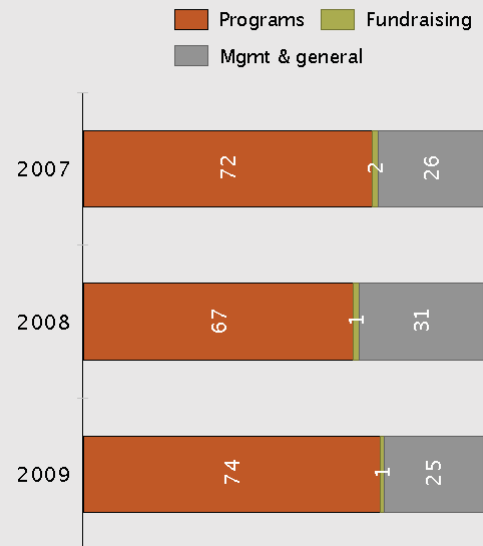
**Revenue -vs- Expense (\$000)**



Indicators of Contributor Base

Number of individual donors who gave > \$35	221	65	49
Number of individual donors who gave > \$1,000	7	4	3
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	N/A	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	N/A
Percent of total revenue from top 10 contributors	23%	21%	24%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 6,452	

**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>	<u>Audited</u> <u>2009</u>
Cash and cash equivalent balance at beginning of year	\$10,357	\$27,840	\$18,318
Net cash provided (used) by operating activities	-1,671	16,525	-6,578
Net cash provided (used) by investing activities	834	-7,812	-1,421
Net cash provided (used) by financing activities	18,320	-18,235	-736
Net increase (decrease) in cash	\$17,483	-\$9,522	-\$8,735
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$27,840</u>	<u>\$18,318</u>	<u>\$9,583</u>

**2009**

**National Youth Advocacy Coalition (NYAC)**

**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2007		<i>Audited</i> 2008		<i>Audited</i> 2009
<i>Assets</i>					
Cash and cash equivalents	\$27,840		\$18,318		\$9,583
Investments	0		0		0
Other current assets	61,830		79,188		21,700
Net fixed assets	2,490		4,869		4,247
Other long-term assets	13,966		11,177		14,056
<b>Total Assets</b>	<b>\$106,126</b>		<b>\$113,552</b>		<b>\$49,586</b>
<i>Liabilities</i>					
Current liabilities	\$83,135		\$59,718		\$40,417
Long-term debt	18,250		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$101,385</b>		<b>\$59,718</b>		<b>\$40,417</b>
<i>Net Assets</i>					
Unrestricted	4,741		28,163		-3,226
Temporarily restricted	0		25,671		12,395
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$106,126</b>		<b>\$113,552</b>		<b>\$49,586</b>

**Statement of Activities**

	<i>Audited</i> 2007		<i>Audited</i> 2008		<i>Audited</i> 2009	
<i>Support &amp; Revenue</i>						
Individual contributions	\$82,812	10%	\$16,266	3%	\$12,852	3%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	91,750	11%	8,834	2%	53,491	10%
Corporate contributions/Non-event sponsorships	53,331	6%	1,550	0%	0	0%
Government funding	568,438	69%	401,720	77%	381,300	75%
Program income	12,330	1%	14,188	3%	0	0%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	17,530	2%	76,230	15%	62,778	12%
<b>Total Revenue</b>	<b>\$826,191</b>		<b>\$518,788</b>		<b>\$510,421</b>	
<i>Expenses</i>						
Program services	591,598	72%	325,798	66%	411,854	74%
Fundraising	12,703	2%	7,365	1%	4,884	1%
Management and general	216,755	26%	153,981	31%	136,305	25%
<b>Total cash expenses</b>	<b>\$821,056</b>		<b>\$487,144</b>		<b>\$553,043</b>	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	2,114	0%	8,222	2%	2,043	0%
<b>Total non-cash expenses</b>	<b>\$2,114</b>		<b>\$8,222</b>		<b>\$2,043</b>	
<b>Total Expenses</b>	<b>\$823,170</b>		<b>\$495,366</b>		<b>\$555,086</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$3,021</b>		<b>\$23,422</b>		<b>-\$44,665</b>	

**2009**

**National Youth Advocacy Coalition (NYAC)  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
6	67%	33%	33%	The board as a whole is responsible for raising or personally donating \$9,000 this fiscal year. In addition the board has committed to raise \$30,000 by hosting fundraising events around the country.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	83%	17%	0%	0%

National Youth Advocacy Coalition (NYAC)  
1638 R St., NW, Suite 300  
Washington, DC 20009  
202-319-7596  
www.nyacyouth.org

Additional Locations

None

Legal Names

National Youth Advocacy Coalition - 501(c)(3)

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.5	2.9	5.0
Compensation	\$35,492	\$51,039	\$67,868

Contact

Greg Varnum  
Executive Director  
greg@nyacyouth.org

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
5	4	1	40%	60%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
20%	0%	60%	20%	0%	0%

*Note: Board and staff data as of 7/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

In accordance with good financial practices, NYAC's policy is to change auditors every five years. FY2009 marked the first year that NYAC worked with a new audit firm, Gelman, Rosenberg & Freedman. As a result of the new firm's recommendations, NYAC opted to eliminate some old receivables that were on our books from prior fiscal years and wrote them off as uncollectible. This write-off led to a small deficit at the end of the fiscal year rather than the surplus that NYAC typically has. The auditors and NYAC's board are confident that the changes have resulted in a more accurate financial picture moving forward into FY2010.

For additional information, please contact NYAC or visit our website at [www.nyacyouth.org](http://www.nyacyouth.org).



**2009**

**NYC Gay and Lesbian Anti-Violence Project**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1980	NYC & National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$2,303,102	18
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Eliminate hate violence, sexual assault, stalking, and domestic violence in LGBT, queer, and HIV-affected communities through counseling, advocacy, organizing, and public education. Additionally, through our National Coalition of Anti-Violence Programs (NCAVP), create a national response to the violence within and against LGBTQH communities through public policy work, documentation of violence, direct service, training and technical assistance.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Develop national resource center for LGBT anti-violence work** that will house anti-violence policy, literature, research, training materials, survivor information and resources and best-practice models.
- Coordinate national and local rapid-incident responses to incidents of anti-LGBT hate-motivated violence, pick up crimes, domestic violence and sexual assault across the US** and associated technical assistance through our Community Rapid Incident Response Initiative such as drafting and circulating press releases and action alerts and providing technical assistance and support to individuals, groups and communities responding to violence.
- Develop and provide national technical assistance, training and support on LGBT violence-related immigration issues for LGBT and ally community-based organizations** on topics such as asylum, attorney access, and resources through our newly formed Immigration Committee. Initial work will include a resource guide for LGBT immigrants and individuals and agencies working with them, as well as websites, relevant nonprofit listings, and specific referrals to groups that work on asylum cases, both for profit and pro bono.
- Double the amount of national LGBT anti-violence technical assistance, training and support to LGBT and ally community-based organizations** through a variety of media including webcasts, audio conferences, conferences, in person trainings, and materials distribution.
- Increase Coalition membership by 25% through the Public Education and Training Initiative** that supports existing non-member organizations and assists the growth of new LGBT anti-violence organizations and programs in underserved cities and regions. The initiative provides onsite training and skills building, leadership development, technical services and other needed technical assistance to any organization trying to establish or expand LGBT-specific anti-violence services.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

One-year Key Planned Accomplishments for FY2010

1. **Complete a coordinated campaign to raise the national visibility of anti-violence incidents and coordinated response** through improved media engagement and training and technical assistance to the NCAVP membership on how to use the media to advance our work on LGBT anti violence issues and to call attention to the need for legislative and funding support on these issues which will result in a 25% increase in LGBT anti-violence media stories and a policy paper with a non-LGBT national anti-violence organization.
2. **Develop and enact a restructured decision-making process by which the Coalition will set goals for 2010-2011 and review goals annually.** This will involve professionally-facilitated strategic conversations among coalition members to determine ways in which NCAVP, now a program of NYC AVP, will maintain its identity as a coalition and balance its two main roles: (1) developing local programs and responding to incidents of hate violence through technical assistance, trainings, and annual meetings; and (2) conducting national policy work and developing a national voice on anti-LGBT hate violence. NCAVP benefits tremendously from its incredibly diverse membership, with programs throughout the country working in frontier, rural, suburban and urban regions.
3. **Host our annual Roundtable and Regional Training Academy** to develop and share effective program information and best practices among NCAVP member organizations, allies and communities across the country.
4. **Produce the annual *National Hate Violence Against Lesbian, Gay, Bisexual and Transgender People in the United States Report* and the *National Domestic Violence in the Lesbian, Gay, Bisexual and Transgender Communities Report*** which comprise the most comprehensive data collected and analyzed on anti-LGBT hate violence and LGBT domestic violence in the US.
5. **Revamp and reorganize [www.NCAVP.org](http://www.NCAVP.org)** to include key data, analysis, information, articles and other resources on LGBT violence issues.

Key Accomplishments in FY2009

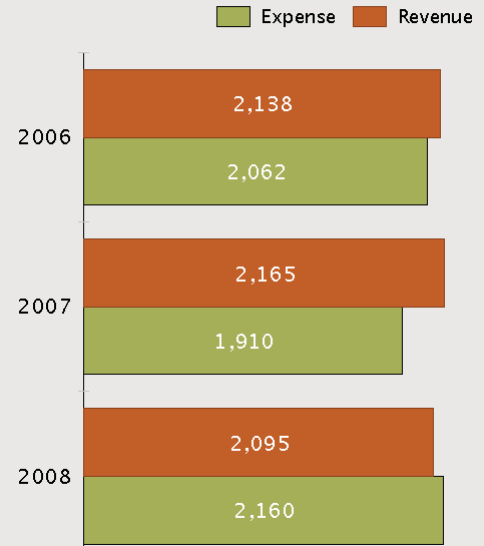
1. Conducted 15 workshops (up from 9) at LGBT community events, conferences, and meetings throughout the US on Safe Dating and Safe Cruising; Taking Domestic Violence Out of the Closet; Assessing Shelter for Transgender Services; and Queer Youth and Self Esteem. Also trained non-LGBT-specific service providers on inclusion of transgender people in gender-segregated human services; best practices for providing LGBT-sensitive healthcare; using LGBT-sensitive language with English- and Spanish-speaking populations; working with HIV-positive LGBT domestic violence victims; and confronting anti-LGBT harassment at work and in schools.
2. Hosted 15th Annual Roundtable (for 27 NCAVP members) and 5th Annual Regional Training Academy (for 65 participants) and covered some/all travel expenses for most participants. Roundtable trainings included immigration and incarceration issues; media training; and "train the trainer" sessions in teaching safe dating, safe cruising and self defense. Regional Training Academy included elder abuse issues; shelter safety; safe environments for LGBT youth; and sexual assault.
3. Expanded reach of Community Rapid Incident Response in high-profile cases including the murder of young transgender woman, Angie Zapata in CO; murder of young Black gay man, Ewan Deszusa in the Bronx; and murder of Duanna Johnson in Memphis, TN, where there is no anti-violence program. NCAVP provided technical assistance, wrote or edited press releases, and/or leveraged political support to keep pressure on local law enforcement agencies to investigate. NCAVP also helped local communities to develop their own community rapid incident responses.
4. Updated NCAVP.org to include new member organizations, new reports and new alerts on LGBT violence issues.
5. Published "Partnering for Change," a chapter in the Domestic Violence Action Manual: Action for Social Change, distributed by the National Resource Center on Domestic Violence's (NRCDV) to 5,000 domestic violence programs and interested individuals in the US.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

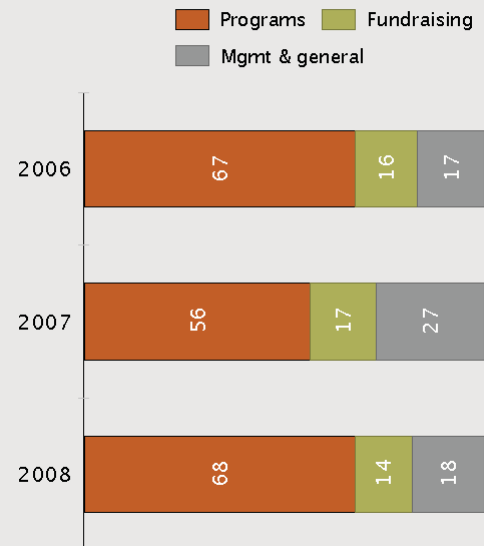
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.0	0.0	0.0
Days of working capital	-46	6	-34
Working capital (\$000)	-\$256	\$30	-\$198
Average daily cash expense (\$000)	\$5.6	\$5.2	\$5.8
Fundraising expense (cash only) to raise \$1	\$0.15	\$0.15	\$0.15
Total revenue raised through development efforts (\$000)	\$2,104	\$2,151	\$2,091
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	171	220	248
Number of individual donors who gave > \$1,000	11	13	26
Donor turnover (gave > \$35 in prior FY & not this FY)	49%	64%	37%
Number of individuals attending fundraising events (paid > \$100 per person)	607	520	278
Percent of total revenue from top 10 contributors	60%	63%	16%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 4,373	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$52,205	\$7,792	\$5,148
Net cash provided (used) by operating activities	59,864	-22,370	165,626
Net cash provided (used) by investing activities	-75,277	-4,074	-223,520
Net cash provided (used) by financing activities	-29,000	23,800	61,900
Net increase (decrease) in cash	-\$44,413	-\$2,644	\$4,006
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$7,792</u>	<u>\$5,148</u>	<u>\$9,154</u>

**2009**

**NYC Gay and Lesbian Anti-Violence Project**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$7,792		\$5,148		\$9,154
Investments	0		0		0
Other current assets	250,344		610,088		350,969
Net fixed assets	72,695		66,993		249,320
Other long-term assets	18,672		18,672		19,082
<b>Total Assets</b>	<b>\$349,503</b>		<b>\$700,901</b>		<b>\$628,525</b>
<b>Liabilities</b>					
Current liabilities	\$514,462		\$584,813		\$557,717
Long-term debt	0		0		0
Other long-term liabilities	107,132		132,767		152,176
<b>Total Liabilities</b>	<b>\$621,594</b>		<b>\$717,580</b>		<b>\$709,893</b>
<b>Net Assets</b>					
Unrestricted	-304,597		-187,379		-115,151
Temporarily restricted	32,506		170,700		33,783
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$349,503</b>		<b>\$700,901</b>		<b>\$628,525</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$231,223	11%	\$563,862	26%	\$281,427	13%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	10,000	0%	0	0%	0	0%
Foundation contributions	277,000	13%	85,000	4%	108,750	5%
Corporate contributions/Non-event sponsorships	15,000	1%	0	0%	0	0%
Government funding	1,316,020	62%	1,257,508	58%	1,588,202	76%
Program income	31,559	1%	52,506	2%	0	0%
Fundraising event income	331,079	15%	297,054	14%	213,191	10%
Less costs of direct benefit to donors	-76,500	-4%	-104,630	-5%	-100,562	-5%
Net fundraising event income	\$254,579		\$192,424		\$112,629	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	2,551	0%	13,630	1%	3,917	0%
<b>Total Revenue</b>	<b>\$2,137,932</b>		<b>\$2,164,930</b>		<b>\$2,094,925</b>	
<b>Expenses</b>						
Program services	1,382,164	67%	1,071,557	56%	1,430,076	66%
Fundraising	309,045	15%	314,619	16%	304,552	14%
Management and general	346,500	17%	513,566	27%	383,793	18%
Total cash expenses	\$2,037,709		\$1,899,742		\$2,118,421	
Non-cash expenses						
In-kind	10,000	0%	0	0%	0	0%
Depreciation	13,805	1%	9,776	1%	41,193	2%
Total non-cash expenses	\$23,805		\$9,776		\$41,193	
<b>Total Expenses</b>	<b>\$2,061,514</b>		<b>\$1,909,518</b>		<b>\$2,159,614</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$76,418</b>		<b>\$255,412</b>		<b>-\$64,689</b>	

**2009**

**NYC Gay and Lesbian Anti-Violence Project**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
Total	Male	Female	Transgender	Fundraising Requirements		
7	57%	43%	0%	\$5,000 give or get		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	NYC Gay and Lesbian Anti-Violence Project 240 W. 35th St., Suite 200 New York, NY 10001 212-714-1184 www.avp.org  <u>Additional Locations</u>
14%	0%	86%	0%	0%	0%	
Senior Management Profile						None  <u>Legal Names</u> New York City Gay and Lesbian Anti-Violence Project, Inc. - 501(c)(3) National Coalition of Anti-Violence Programs - 501(c)(3)
			<u>Lowest</u>	<u>Average</u>	<u>Highest</u>	
Tenure with the organization			1.0	3.3	8.0	
Compensation			\$90,000	\$108,333	\$130,000	<u>Contact</u> Sharon Stapel Executive Director SStapel@avp.org
Paid Staff						
Total	Full-Time	Part-Time	Male	Female	Transgender	
18	17	1	22%	56%	22%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
11%	11%	39%	39%	0%	0%	
<p><i>Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>						

**Organization's Notes and Advisories**

**Finance Related** - In FY2008, NYC AVP again received an unqualified audit opinion. As well, in FY2008, AVP spent 68% of each dollar on programs, up from 55% in FY2007. These findings demonstrate the success of the agency's strategies to create and maintain fiscal soundness through the implementation of several financial and development-based systems. However, in FY2008 NYC AVP was without an Executive Director for the last six months of the fiscal year and without a Development Director for the first eleven months of the fiscal year. Now fully staffed, NYC AVP continues to build upon the success of FY2007 and has made significant changes in FY2009.

NCAVP legally became a project of NYC AVP in FY2009 when the organizations entered into an agreement transferring all assets from NCAVP to NYC AVP; NCAVP will dissolve its 501(c)(3) status in July 2009. In addition:

- NYC AVP began outsourcing fiscal management
- Increased capacity of the Board of Director's Finance Committee
- Increased programmatic support
- Increased support for organizational capacity and development
- Developed a multi-year timely and effective response to the current economic climate

Specifically, NYC AVP has outsourced grants management to an independent grants management consultant and created the most efficient, transparent and effective fiscal management policies and procedures which will result in stable, long-term fiscal management systems that will assure the organization's fiscal viability in the years to come.

In FY2009 AVP created a strategic plan that addresses board, fundraising, finance, and programmatic development with specific goals set for each aspect of the organization's evolution over the next three years.

We believe that the proactive steps we have taken will protect NYC AVP in the years to come and we expect that our future audits will demonstrate, as this year's audit did, our dedicated work to assure that each aspect of our organization runs as efficiently and transparently as possible. We are confident that these changes will result in a stronger infrastructure for NYC AVP, increased transparency in fiscal management for the organization and a clearly outlined long-term plan for the organization's financial stability.



*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1999	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,107,534	15
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Educate and empower organizations, human resources (HR) professionals, employee resource groups (ERGs) and individual employees through programs and services that result in equal opportunities, policies, practices, and benefits in the workplace regardless of sexual orientation, gender identity, expression, or characteristics.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- LGBTCareerLink.com** - Operate LGBT Web-based career development portal, launched 11/08, linking job-seekers with LGBT-friendly employers of all sizes and providing career development resources and content specific to LGBT workers. In partnership with businesses, universities and nonprofit organizations, LGBTCareerLink will deliver webinars, online meetings, career panels, training (e.g., in time management, collaborative decisionmaking), virtual job fairs and moderated forums.
- Executive Forum** - Convene annual invitation-only Executive Forum, where top LGBT executives share their ideas and experiences, discuss current issues, learn best practices, and shed light on the corporate environment in the US and abroad. Expand programming to foster work environments that encourage more executives to come out and that provide advancement opportunities to LGBT corporate leaders.
- ERGs** - Develop programs and services that support ERGs' growth and development, including enhanced online directory of ERG resources, worldwide community of ERG leaders, suggested speakers and consultants, and outreach to non-LGBT ERGs. Expand programming to include services to, and networking with, groups outside the US.
- Out & Equal 2.0** - Use Web 2.0 technology ("Social Media") to enhance constituents' access to LGBT resources, including an online networking site, Web-based seminars and trainings, and a blog; and to increase staff productivity and connectivity.
- Regional Affiliate Program** - Increase infrastructure for grassroots and local organizing, including interactive web-based communities at the Regional Affiliate level and local educational and networking events about LGBT workplace issues. O&E will increase # of affiliates in underserved US communities and international cities.
- Training Programs** - Expand Out & Equal's diversity training offerings (training, educational resources and consulting services to senior management, HR professionals, ERGs and individual employees) and develop infrastructure to deliver training online.

One-year Key Planned Accomplishments for FY2009

- Host full-day leadership seminars including: ERG leadership seminar on developing stronger relationships and influence; ERG Leadership Seminar on latest best practices; Online Brand Called You seminar on using online social networks for professional networking and career advancement; and LGBT Leadership Diversity and Transgender Leadership Diversity seminars that focus on cultural competency and diversity issues.
- Expand popular Town Call speaker series program (now in its 4th year) to 12 free teleconferences/ webinars featuring respected leaders on HR development topics and ERG issues.
- Produce 2009 Out & Equal Workplace Summit for 1,500+ participants. More than 120 workshops will address evolving learning needs of LGBT employees, HR and diversity professionals, ERG leaders, executives and organizational leaders and allies, from basic skills to understanding LGBT experience to advanced and specialized topics.
- Add 4+ new affiliate cities, focusing on under-represented regions. Conduct semi-annual feedback surveys for regional affiliates and produce evaluation toolkit enabling regional affiliates to survey local constituent needs.

**2009**

**Out & Equal Workplace Advocates**  
**Standard Annual Report**

Page 2  
10/9/2009

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2008

1. Developed an annual conference on LGBT workplace equality with 2,232 participants.
2. Offered 155 unique workshops and panels at O&E annual conference for participants from 349 organizations and 42 states.
3. Conducted 75 public regional educational events with 3700 participants.
4. Launched 4 new local regional affiliates.
5. Conducted 20 LGBT Training & Professional Development workshops for 752 participants.
6. Conducted 7 free Town Call educational programs for 592 participants.
7. Developed and launched [www.lgbtcareerlink.com](http://www.lgbtcareerlink.com) offering career opportunities and resources to the LGBT community and public.
8. Held 2nd executive forum for LGBT executives to provide them leadership on LGBT equality workplace issues.
9. Reached 2,000+ people at 20+ engagements about LGBT workplace equality issues.
10. Produced three reports: *State of LGBT Employee Resource Groups*, *Engaging ERG Membership: 3 Case Studies*, and *2008 Workplace Survey*.

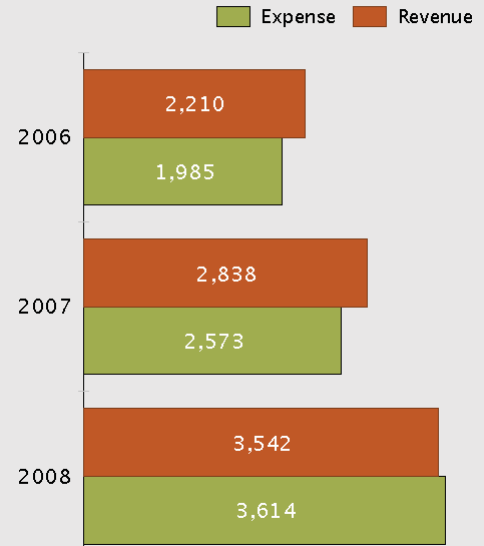
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

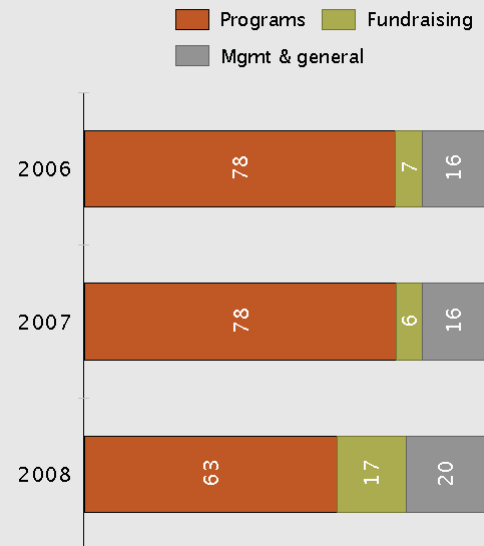
For the fiscal year ending December 31

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	4.8	2.9	5.4
Days of working capital	140	138	104
Working capital (\$000)	\$728	\$942	\$959
Average daily cash expense (\$000)	\$5.2	\$6.8	\$9.2
Fundraising expense (cash only) to raise \$1	\$0.09	\$0.07	\$0.30
Total revenue raised through development efforts (\$000)	\$1,451	\$1,740	\$2,031
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	46	185	80
Number of individual donors who gave > \$1,000	8	35	10
Donor turnover (gave > \$35 in prior FY & not this FY)	61%	22%	65%
Number of individuals attending fundraising events (paid > \$100 per person)	0	58	64
Percent of total revenue from top 10 contributors	39%	22%	22%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 8,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$498,130	\$633,838	\$655,818
Net cash provided (used) by operating activities	234,646	444,660	91,684
Net cash provided (used) by investing activities	-98,938	-422,680	-99,481
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$135,708	\$21,980	-\$7,797
<b>Cash and Cash Equivalent Balances at End of Year</b>	<b>\$633,838</b>	<b>\$655,818</b>	<b>\$648,021</b>

**2009**

**Out & Equal Workplace Advocates**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<b>Assets</b>					
Cash and cash equivalents	\$633,838		\$655,818		\$648,021
Investments	0		329,553		339,795
Other current assets	224,897		291,265		153,357
Net fixed assets	87,095		138,101		122,177
Other long-term assets	8,263		8,263		19,041
<b>Total Assets</b>	<b>\$954,093</b>		<b>\$1,423,000</b>		<b>\$1,282,391</b>
<b>Liabilities</b>					
Current liabilities	\$131,167		\$334,990		\$182,179
Long-term debt	0		0		0
Other long-term liabilities	0		0		85,000
<b>Total Liabilities</b>	<b>\$131,167</b>		<b>\$334,990</b>		<b>\$267,179</b>
<b>Net Assets</b>					
Unrestricted	717,926		1,058,010		1,015,212
Temporarily restricted	105,000		30,000		0
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$954,093</b>		<b>\$1,423,000</b>		<b>\$1,282,391</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$38,323	2%	\$66,419	2%	\$84,726	2%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	85,176	4%	59,145	2%	215,207	6%
Foundation contributions	130,402	6%	56,700	2%	41,936	1%
Corporate contributions/Non-event sponsorships	1,294,865	59%	1,449,168	51%	1,904,295	54%
Government funding	0	0%	0	0%	0	0%
Program income	638,706	29%	1,159,421	41%	1,299,339	37%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	31,549	1%	-32,096	-1%
Other revenue	22,107	1%	15,245	1%	28,228	1%
<b>Total Revenue</b>	<b>\$2,209,579</b>		<b>\$2,837,647</b>		<b>\$3,541,635</b>	
<b>Expenses</b>						
Program services	1,484,247	75%	1,978,377	77%	2,079,396	58%
Fundraising	128,925	6%	123,025	5%	605,892	17%
Management and general	282,335	14%	390,895	15%	673,022	19%
Total cash expenses	\$1,895,507		\$2,492,297		\$3,358,310	
Non-cash expenses						
In-kind	72,176	4%	38,145	1%	206,207	6%
Depreciation	16,916	1%	42,121	2%	49,916	1%
Total non-cash expenses	\$89,092		\$80,266		\$256,123	
<b>Total Expenses</b>	<b>\$1,984,599</b>		<b>\$2,572,563</b>		<b>\$3,614,433</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$224,980</b>		<b>\$265,084</b>		<b>-\$72,798</b>	

**2009**

**Out & Equal Workplace Advocates  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
10	40%	50%	10%	Minimum \$5,000 per calendar year.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	10%	80%	10%	0%	0%

Out & Equal Workplace Advocates  
155 Sansome St., Suite 450  
San Francisco, CA 94104  
415-694-6500  
www.outandequal.org

Additional Locations

**Senior Management Profile**

None

Legal Names

Out & Equal - 501(c)(3)

Contact

Selisse Berry  
Executive Director  
sberry@outandequal.org

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.6	3.5	10.0
Compensation	\$79,790	\$101,198	\$140,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
15	15	0	47%	53%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	80%	20%	0%	0%

*Note: Board and staff data as of 8/17/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Background** - In 1998, 4 small groups of workplace advocates merged to become Out & Equal Workplace Advocates. Since then the organization has provided LGBT diversity training, offered networking events for LGBT employees, and planned the annual Out & Equal Workplace Summit. The organization functioned as a project of United Way of the Bay Area (UWBA) until July 1, 2004. It has grown from an initial \$40,000 UWBA grant in 1998 to a \$2.8 million budget in FY2009. The staff has grown from 1 FTE in 1998 to 16 paid staff in FY2009. FY2005 was the 1st full year that Out & Equal operated as an independent 501(c)(3) nonprofit organization.
- Working Capital** - Out & Equal maintains a medium level of working capital due to the cyclical nature of revenues and expenses from the annual Workplace Summit.



Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1998	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Capacity-building Research
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$400,000	5
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Use rigorous social science to inform public discussions of controversial social issues, enabling policy outcomes to be informed more by evidence than by emotion. We believe the public makes wise choices on social issues when high-quality information is available. The Don't Ask, Don't Tell (DADT) Project informs public discussion of LGBT and other marginalized sexual identities in the armed forces.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Public Debate** - Continue to move conversation about gays in the military in meaningful ways by infusing public discourse with evidence-based research. Maintain and develop flexible capacity in a changing political environment.
- Outreach to Military Leadership** - Grow network of military leaders who turn to the Palm Center for insight and guidance on gender and sexuality issues; institutionalize those networks through military academies.
- Research** - Sponsor innovative, state-of-the-art, and interdisciplinary research on the military and gender and sexuality to enhance the quality of public dialogue about critical and controversial issues.
- Clearinghouse** - Become the national center for research and support for any activists, politicians or military leaders interested in the gays in the military issue. Become the go-to consultant for Congress and the Pentagon on post-repeal implementation.
- Transgender** - In preparation for DADT repeal, launch major research-based education initiative in the media and Congress on Britain's, Canada's and Israel's successful experiences in allowing transgender service members in the military.

One-year Key Planned Accomplishments for FY2010

- Public Debate** - Break 2-5 major media stories that move the gays-in-the-military conversation forward by putting meaningful information in hands of policy makers. Major media stories are covered in national news outlets.
- Outreach to Military Leadership** - Deliver lectures based on state-of-the-art research on gays in the military at West Point, Army War College, Air Force Academy, and other military universities where future military leaders are trained. Expand list of 100 Generals and Admirals who will engage with military leadership through evidence-based research. Build an important bridge across race and sexual orientation by reaching out to military leaders of color on DADT.
- Research** - Publish 2-4 studies including: 1) a statistical study of whether forcing service members to hide their sexual orientation undermines job performance, and 2) a legal memo outlining ways the Pentagon can implement "don't ask, don't tell."
- New Media** - Expand Palm Center Blog from our current list of seven authors to up to twelve. Develop/grow subscribers to our new monthly e-newsletter to around 2000 subscribers. Maintain traffic to the Palm Center website and increase the percentage of visitors who are one the site longer than ten seconds (this is about 30% right now). Develop Palm Center Facebook page, increase fans to more than 250.

**2009**

**The Palm Center  
Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

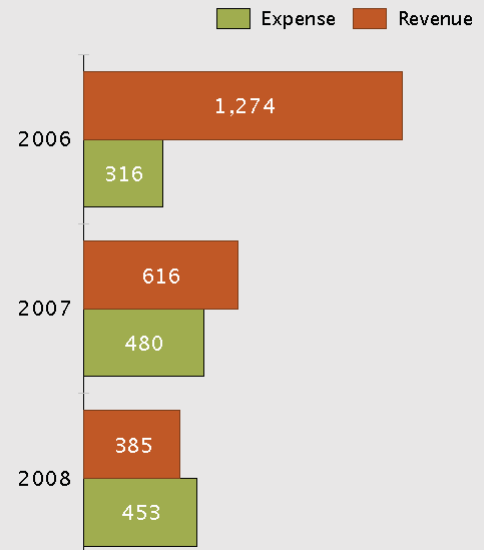
1. Reframed national conversation about gays in the military by releasing "How to End DADT: A Roadmap of Political, Legal, Regulatory, and Organizational Steps to Equal Treatment," which explained that President Obama has stroke-of-the-pen authority to suspend the ban.
2. Nathaniel Frank's book, *Unfriendly Fire*, was published and generated a New York Times review and appearances on The Daily Show, Anderson Cooper 360 and Rachel Maddow Show. It has been hailed as the definitive history of DADT and definitive refutation of anti-gay arguments used to justify it.
3. Broke major national media story about 104 retired Generals and Admirals calling for DADT repeal covered in hundreds of media outlets.
4. Released Flag/General Officer report evaluating DADT's effectiveness, which was based on a year of research and signed by 1 retired flag officer each from the Army, Navy, Air Force and Marines. It was cited by a Republican during Congressional hearings and picked up by 1,500 media outlets.
5. Delivered lectures on DADT to Army War College, Air Force Academy, and West Point. Continued to expand list of military professors who support repeal.
6. Released study refuting anti-gay arguments about gays in the military, published by the *Duke Journal of Gender and the Law*.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

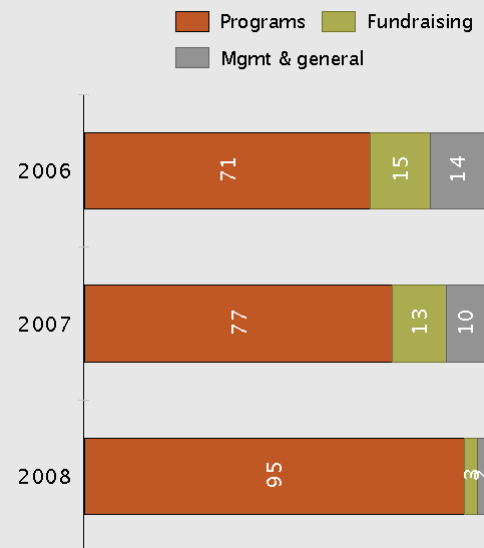
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	N/A	N/A	N/A
Days of working capital	N/A	N/A	N/A
Working capital (\$000)	N/A	N/A	N/A
Average daily cash expense (\$000)	\$0.9	\$1.3	\$1.2
Fundraising expense (cash only) to raise \$1	\$0.04	\$0.13	\$0.03
Total revenue raised through development efforts (\$000)	\$1,274	\$478	\$494
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	7	6	9
Number of individual donors who gave > \$1,000	1	5	6
Donor turnover (gave > \$35 in prior FY & not this FY)	69%	86%	83%
Number of individuals attending fundraising events (paid > \$100 per person)	0	0	0
Percent of total revenue from top 10 contributors	99%	68%	86%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 3,700	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>N/A</u> <u>2006</u>	<u>N/A</u> <u>2007</u>	<u>N/A</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	N/A	N/A	N/A
Net cash provided (used) by operating activities	N/A	N/A	N/A
Net cash provided (used) by investing activities	N/A	N/A	N/A
Net cash provided (used) by financing activities	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>
Net increase (decrease) in cash	N/A	N/A	N/A
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>

**2009**

## The Palm Center

### Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

	N/A 2006	N/A 2007	N/A 2008
<i>Assets</i>			
Cash and cash equivalents	N/A	N/A	N/A
Investments	N/A	N/A	N/A
Other current assets	N/A	N/A	N/A
Net fixed assets	N/A	N/A	N/A
Other long-term assets	N/A	N/A	N/A
<b>Total Assets</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<i>Liabilities</i>			
Current liabilities	N/A	N/A	N/A
Long-term debt	N/A	N/A	N/A
Other long-term liabilities	N/A	N/A	N/A
Total Liabilities	N/A	N/A	N/A
<i>Net Assets</i>			
Unrestricted	N/A	N/A	N/A
Temporarily restricted	N/A	N/A	N/A
Permanently restricted	N/A	N/A	N/A
<b>Total Liabilities and Net Assets</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

### Statement of Activities

	Derivative 2006		Derivative 2007		Derivative 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$12,110	1%	\$87,500	14%	\$17,025	4%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	1,251,000	98%	340,535	55%	396,777	103%
Corporate contributions/Non-event sponsorships	10,500	1%	50,000	8%	80,272	21%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	138,014	22%	-109,211	-28%
Other revenue	0	0%	0	0%	0	0%
<b>Total Revenue</b>	<b>\$1,273,610</b>		<b>\$616,049</b>		<b>\$384,863</b>	
<i>Expenses</i>						
Program services	226,000	71%	368,894	77%	429,679	95%
Fundraising	47,450	15%	64,509	13%	15,329	3%
Management and general	42,900	14%	46,344	10%	8,212	2%
Total cash expenses	\$316,350		\$479,747		\$453,220	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	0	0%	0	0%	0	0%
Total non-cash expenses	\$0		\$0		\$0	
<b>Total Expenses</b>	<b>\$316,350</b>		<b>\$479,747</b>		<b>\$453,220</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$957,260</b>		<b>\$136,302</b>		<b>-\$68,357</b>	

**2009**

**The Palm Center  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
4	100%	0%	0%	None	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
25%	0%	75%	0%	0%	0%

**Locations & Contact**

The Palm Center  
University of California  
Santa Barbara, CA  
93106-9420  
805-893-5664  
www.palmcenter.org

Additional Locations

Denver  
New York  
Washington DC

Legal Names

University of California,  
Santa Barbara; Institute for  
Social, Behavioral, and  
Economic Research -  
501(c)(3)

Contact

Aaron Belkin  
Director  
belkin@palmcenter.ucsb.edu

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	2.8	7.6	11.0
Compensation	N/A	N/A	N/A

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
5	0	5	80%	20%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	80%	20%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Statement of Financial Position** - The Palm Center's accounting is handled by the University of California and money received by the Palm Center is held/managed by the University for future expenditures. The University does not prepare a separate Statement of Financial Position for the Palm Center and so this information is not available for this report.
- Foundation Contributions** - The Palm Center received a gift of \$900,000 in FY2006 to establish an endowment. The full amount of the gift revenue was recognized in FY2006 when it was awarded.
- Senior Management Compensation** - The Palm Center's senior management serves on a part-time basis, so full-time salary information is not applicable.



**2009**

**PFLAG**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1973	National
<i>Fiscal Year</i>	<i>Type</i>
Oct - Sep	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,430,655	17
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Promote the health and well-being of LGBT persons, their families and friends through: support, to cope with an adverse society; education, to enlighten an ill-informed public; and advocacy, to end discrimination and to secure equal civil rights. PFLAG provides opportunity for dialogue and acts to create a society that is healthy and respectful of human diversity.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Provide field training and support to 650 chapters /affiliates to develop more parent, family, straight ally, and LGBT leaders to advance LGBT equality at local, state, and federal levels.
2. Work with our collaborating national organization partners to enact 2 of 5 pieces of target federal policy: hate crimes, ENDA, safe schools, repeal of DADT, repeal of DOMA.
3. Certify 600 parent trainers to reduce bullying, harassment and violence based on actual or perceived sexual orientation, gender identity or expression in schools or youth-based environments (e.g., fostercare, juvenile detention).
4. Develop, pilot and assess diversity training for members of chapters in 24 states to create local coalitions between PFLAG chapters and organizations targeting diverse individuals, families and communities.
5. Facilitate 150 Straight for Equality consultations and trainings in workplaces, faith communities, civic groups and schools to create new straight allies to become engaged to advance LGBT equality.

One-year Key Planned Accomplishments for FY2009

1. Provide field training and one-on-one support to 30 new chapters in 15 states.
2. Hire policy manager and work to establish relationships with 50 congresspersons through Hill lobby visits and member in-district meetings.
3. Conduct 7 Cultivating Respect Safe Schools certification trainings for members that results in 28 individual school projects (i.e., in-service trainings, book donations, trainings with GSAs, meetings with school counselors, school policy change).
4. Develop new Faith Field Guide and conduct trainings on it in 10 states.
5. Develop and pilot in 5 chapters a full-day diversity training. Work with pilot chapters on outreach projects based on the training and associated PFLAG-provided resources.
6. Facilitate 35 corporate Straight for Equality in the Workplace trainings in 15 corporations. Present or exhibit Straight for Equality materials at 2 non-LGBT diversity and inclusion conferences.

Key Accomplishments in FY2008

1. Provided field-based support and training to 152 chapters in 29 states in, e.g., strategic planning, membership recruitment/development, and in-district meetings or lobby days.
2. Developed and piloted new Cultivating Respect Safe Schools training and new resource, *Top Ten Ways to Make Schools Safer for All Students*. Conducted 3 full-day safe schools training and 6 mini-trainings. Exhibited at conferences of National School Counselors Association, National PTA and National School Boards Association.
3. Produced 3-day national convention for 400+ members and supporters and conducted 150 visits during Capitol Hill Lobby day.

**2009**

**PFLAG**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

4. With local chapters, conducted protests of 3 ex-gay conferences and trained other chapters to prepare for 2 upcoming ex-gay conferences. Developed a new faith training and trained members in 7 states.
5. Granted 7 diversity awards to worthy chapter outreach projects. Developed new short-form diversity training and held it for chapters in 6 states. Hired new Diversity Outreach Manager.
6. Hired a Director of Equality Partnerships and Equality Partnerships Coordinator to lead the national straight ally project. Developed 2 corporate trainings for executives and managers and completed 30 corporate trainings in 11 corporations. Exhibited and presented at 2 non-LGBT diversity and inclusion conferences including the Society for Human Resource Management and the Dr. Johnnetta B. Cole Global Diversity and Inclusion Institute.
7. Developed, piloted and introduced new technology service for chapters to create their own websites via the PFLAG National website to make PFLAG National resources more easily accessible at the local level. Helped 75 chapters create websites that are more consistently branded with PFLAG National to increase the PFLAG brand recognition in their local communities.

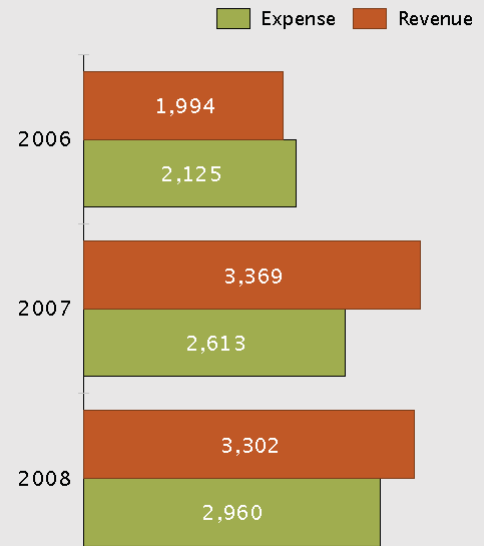
*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Indicators of Financial Health & Efficiency**

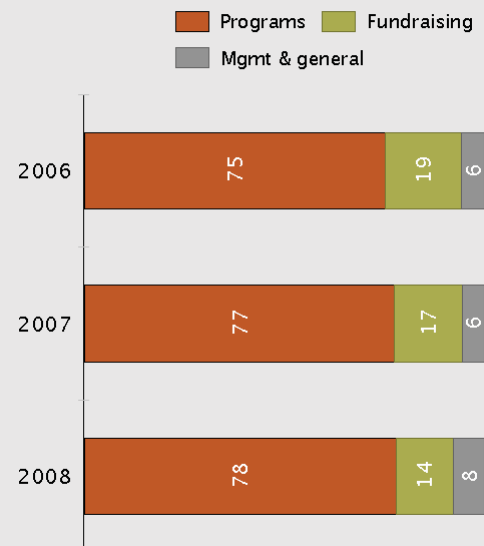
**For the fiscal year ending September 30**

<u>Ratios of Financial Health</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Liquidity ratio	3.4	1.5	2.0
Days of working capital	151	124	126
Working capital (\$000)	\$793	\$724	\$902
Average daily cash expense (\$000)	\$5.3	\$5.8	\$7.2
Fundraising expense (cash only) to raise \$1	\$0.22	\$0.13	\$0.13
Total revenue raised through development efforts (\$000)	\$1,827	\$3,211	\$3,126
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	6,965	6,888	6,946
Number of individual donors who gave > \$1,000	118	73	109
Donor turnover (gave > \$35 in prior FY & not this FY)	45%	39%	49%
Number of individuals attending fundraising events (paid > \$100 per person)	61	0	0
Percent of total revenue from top 10 contributors	31%	19%	39%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 105,442	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$736,539	\$664,001	\$549,041
Net cash provided (used) by operating activities	-189,111	-21,567	124,443
Net cash provided (used) by investing activities	-112,467	-18,440	-14,996
Net cash provided (used) by financing activities	<u>229,040</u>	<u>-74,953</u>	<u>-88,674</u>
Net increase (decrease) in cash	-\$72,538	-\$114,960	\$20,773
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$664,001</u>	<u>\$549,041</u>	<u>\$569,814</u>

**2009**

**PFLAG  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<i>Assets</i>					
Cash and cash equivalents	\$664,001		\$549,041		\$569,814
Investments	0		0		0
Other current assets	323,056		530,803		622,457
Net fixed assets	140,975		95,507		71,400
Other long-term assets	359,190		1,141,532		1,224,242
<b>Total Assets</b>	<b>\$1,487,222</b>		<b>\$2,316,883</b>		<b>\$2,487,913</b>
<i>Liabilities</i>					
Current liabilities	\$194,017		\$356,324		\$290,718
Long-term debt	155,166		83,514		0
Other long-term liabilities	51,790		34,463		12,059
<b>Total Liabilities</b>	<b>\$400,973</b>		<b>\$474,301</b>		<b>\$302,777</b>
<i>Net Assets</i>					
Unrestricted	22,204		-86,872		79,227
Temporarily restricted	1,064,045		1,929,454		2,105,909
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$1,487,222</b>		<b>\$2,316,883</b>		<b>\$2,487,913</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$1,148,803	58%	\$891,476	26%	\$1,030,354	31%
Bequests	49,105	2%	1,221,875	36%	497,150	15%
Dues	105,299	5%	97,645	3%	103,800	3%
In-kind contributions	163,201	8%	417,731	12%	290,387	9%
Foundation contributions	312,764	16%	267,000	8%	263,048	8%
Corporate contributions/Non-event sponsorships	75,909	4%	206,654	6%	738,893	22%
Government funding	0	0%	0	0%	0	0%
Program income	48,497	2%	187,336	6%	296,261	9%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	12,570	1%	14,188	0%	5,485	0%
Investment income	21,833	1%	26,002	1%	15,881	0%
Other revenue	56,333	3%	39,018	1%	60,881	2%
<b>Total Revenue</b>	<b>\$1,994,314</b>		<b>\$3,368,925</b>		<b>\$3,302,140</b>	
<i>Expenses</i>						
Program services	1,399,586	66%	1,581,885	61%	2,010,822	68%
Fundraising	394,125	19%	433,113	17%	412,571	14%
Management and general	123,272	6%	116,700	4%	195,356	7%
<b>Total cash expenses</b>	<b>\$1,916,983</b>		<b>\$2,131,698</b>		<b>\$2,618,749</b>	
Non-cash expenses						
In-kind	163,201	8%	417,731	16%	275,303	9%
Depreciation	44,993	2%	63,163	2%	65,534	2%
<b>Total non-cash expenses</b>	<b>\$208,194</b>		<b>\$480,894</b>		<b>\$340,837</b>	
<b>Total Expenses</b>	<b>\$2,125,177</b>		<b>\$2,612,592</b>		<b>\$2,959,586</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$130,863</b>		<b>\$756,333</b>		<b>\$342,554</b>	

**2009**

**PFLAG  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Board Members						Locations & Contact
Total	Male	Female	Transgender	Fundraising Requirements		
21	57%	43%	0%	None		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	PFLAG 1726 M St., NW, Suite 400 Washington, DC 20036 202-467-8180 www.pflag.org  <u>Additional Locations</u> Los Angeles  <u>Legal Names</u> Parents, Families and Friends of Lesbians and Gays, Inc. - 501(c)(3)  <u>Contact</u> Jody M. Huckaby Executive Director jhuckaby@pflag.org
5%	0%	90%	5%	0%	0%	
Senior Management Profile						
			<u>Lowest</u>	<u>Average</u>	<u>Highest</u>	
Tenure with the organization			0.3	3.2	4.9	
Compensation			\$70,050	\$96,630	\$150,000	
Paid Staff						
Total	Full-Time	Part-Time	Male	Female	Transgender	
17	17	0	35%	59%	6%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
12%	0%	76%	12%	0%	0%	
<p><i>Note: Board and staff data as of 8/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>						

**Organization's Notes and Advisories**

- The PFLAG National Office** - PFLAG National guides and supports the work of its more than 500 grassroots, volunteer-based chapters and affiliates across the country. The national office and its affiliates are engaged in support for parents, family members and LGBT individuals, straight ally development, public policy development, public education, safe schools work including local policy advocacy, implementation and oversight, and legislative advocacy at the local, state, and federal levels.



**2009**

**Point Foundation  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2001	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,530,339	12
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Provide financial support, mentoring, leadership training and hope to meritorious students who are marginalized due to sexual orientation, gender identity or gender expression.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. After successfully piloting and evaluating an Internship Program, gain approval from Point's Board of Directors to implement a formal program that provides Point Scholars with career-related work experience in order to connect their academic preparation to their career aspirations. Point internships will be offered by a variety of industries and not-for-profit organizations that are willing to offer meaningful and professional work assignments. The internships will be full-time, ten weeks in duration, and provide Point Scholars with a competitive wage based on their level of experience and the requirements of the internship (\$5,000 - \$7,000).
2. Shape the composition of our scholar class to better reflect the diversity of the LGBTQ student population in the United States. Specifically increase the number of scholars whose ethnicity, gender identity/expression, geographic origin or academic major is under-represented. This will be done through a targeted outreach campaign to the following under-represented communities: First Nation, Native American/Two-Spirit, Transgender/Gender-Nonconforming (MTF), women, individuals with disabilities and a range of educational fields including law, business, and science and technology.
3. Secure funding for and conduct 5 Regional Leadership Forums (RLFs) for Point scholars, mentors, alumni, regents, staff and regional trustees (in regions with highest scholar population). The forums will focus on academic rigor, mentoring, leadership and community service.
4. Provide support and training to the newly formed Alumni Association to motivate and move them to a self-sustaining organization.
5. Increase diversity and admissions & selections expertise amongst volunteer application readers.

One-year Key Planned Accomplishments for FY2010

1. Finalize operational process and identify potential partners for an Internship Pilot Program.
2. Pilot targeted outreach to 5 different LGBT institutions or organizations that are ethnically diverse (Historically Black College Association), major-specific groups and educational institutions (Reaching Out MBA), transgender and gender-variant organizations (Transgender Equality), Two-Spirit (Bay Area American Indian Two Spirits - BAAITS), and institutions/organizations that serve students with disabilities (Gallaudet University).
3. Create sponsorship opportunities and curriculum for RLFs, in collaboration with trustees and regents in each region.
4. Build the 5 existing alumni subcommittees and provide guidance and support to individuals who have assumed leadership roles in the areas of outreach, governance, development, regional networks and alumni conferences.
5. Conduct outreach to high school and college faculty, admissions and financial aid officers, as well as the organization's mentors, alumni, regents, staff and regional trustees. Outreach will be deemed successful if all Point constituents have received materials to conduct outreach and a list of organizations, institutions, and individuals is created so an outreach database can be built and maintained each year to automatically initiate scholarship outreach.

**2009**

**Point Foundation**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

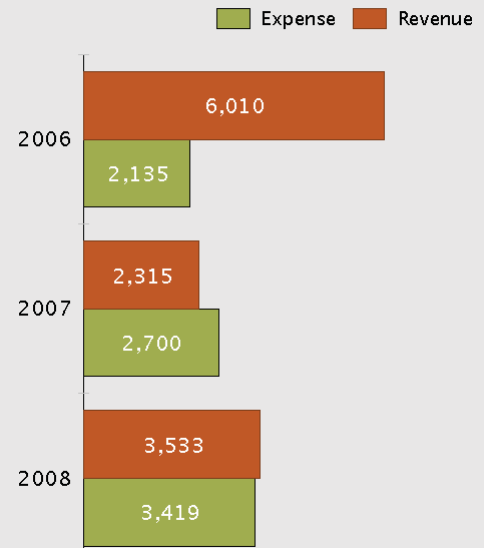
1. Internship Subcommittee, comprised of field experts and professional staff members, gained contingent board approval (pending complete operational detail) for an Internship Pilot Program that includes training on topics such as interviewing, attendance, professional work ethics and a post-internship evaluation for each scholar.
2. Developed an outreach plan targeting under-represented groups in the LGBTQ community, e.g., women, students of color, transgender, gender non-conforming and disabled applicants, and contacted organizations, individuals and groups that serve them (e.g., 90 historically black colleges and 35 transgender/gender non-conforming organizations nationwide). Attended 12 LGBTQ conferences and/or outreach events.
3. Designed and executed a leadership and alumni conference that brought together the largest # of scholars, alumni, staff and regents in Point's history (143 in total). The conference further developed Point's academic and community service commitments, leadership skills, media and public relations skills and philanthropy.
4. With Point's new Alumni Association, formed 5 new subcommittees that will help keep the group connected and increase their sustainability as an independent entity: outreach, governance, development, regional networks and alumni conferences.
5. With targeted outreach, Point increased the number of scholarship applications by 85% compared to 2008. 6,599 online applications were opened and 2,463 were submitted. Racial and ethnic diversity in the Point Scholar Class increased by 13% (from 29% to 42% of the class).

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

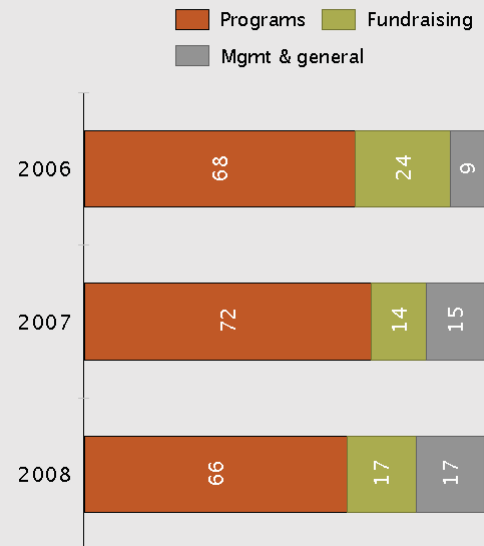
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	66.6	41.0	42.7
Days of working capital	891	597	429
Working capital (\$000)	\$5,150	\$4,350	\$3,917
Average daily cash expense (\$000)	\$5.8	\$7.3	\$9.1
Fundraising expense (cash only) to raise \$1	\$0.18	\$0.17	\$0.17
Total revenue raised through development efforts (\$000)	\$2,808	\$2,144	\$3,424
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	1,997	1,448	557
Number of individual donors who gave > \$1,000	1,599	1,142	120
Donor turnover (gave > \$35 in prior FY & not this FY)	44%	51%	51%
Number of individuals attending fundraising events (paid > \$100 per person)	273	181	473
Percent of total revenue from top 10 contributors	22%	88%	36%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 25,729	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$496,304	\$3,884,507	\$2,029,042
Net cash provided (used) by operating activities	3,561,050	-781,041	-579,983
Net cash provided (used) by investing activities	-181,947	-1,326,224	-149,569
Net cash provided (used) by financing activities	9,100	251,800	27,622
Net increase (decrease) in cash	<u>\$3,388,203</u>	<u>-\$1,855,465</u>	<u>-\$701,930</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$3,884,507</u>	<u>\$2,029,042</u>	<u>\$1,327,112</u>

**2009**

**Point Foundation  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$3,884,507		\$2,029,042		\$1,327,112
Investments	1,243,352		2,884,659		2,760,697
Other current assets	796,539		492,883		889,309
Net fixed assets	20,168		77,988		109,950
Other long-term assets	248,796		354,417		842,040
<b>Total Assets</b>	<b>\$6,193,362</b>		<b>\$5,838,989</b>		<b>\$5,929,108</b>
<b>Liabilities</b>					
Current liabilities	\$66,329		\$96,443		\$72,628
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$66,329</b>		<b>\$96,443</b>		<b>\$72,628</b>
<b>Net Assets</b>					
Unrestricted	4,241,967		3,927,038		2,722,051
Temporarily restricted	1,177,371		855,413		2,146,712
Permanently restricted	707,695		960,095		987,717
<b>Total Liabilities and Net Assets</b>	<b>\$6,193,362</b>		<b>\$5,838,989</b>		<b>\$5,929,108</b>

**Statement of Activities**

	<u>Audited</u> <u>2006</u>		<u>Audited</u> <u>2007</u>		<u>Audited</u> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$2,000,076	33%	\$1,825,793	79%	\$2,880,130	82%
Bequests	2,995,932	50%	2,910	0%	125,336	4%
Dues	0	0%	0	0%	0	0%
In-kind contributions	20,175	0%	26,986	1%	75,883	2%
Foundation contributions	53,000	1%	71,000	3%	141,000	4%
Corporate contributions/Non-event sponsorships	0	0%	71,000	3%	93,318	3%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	817,907	14%	194,115	8%	584,125	17%
Less costs of direct benefit to donors	-63,410	-1%	-18,278	-1%	-274,168	-8%
Net fundraising event income	\$754,497		\$175,837		\$309,957	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	186,495	3%	533,839	23%	-80,046	-2%
Other revenue	0	0%	-392,337	-17%	-12,929	-0%
<b>Total Revenue</b>	<b>\$6,010,175</b>		<b>\$2,315,028</b>		<b>\$3,532,649</b>	
<b>Expenses</b>						
Program services	1,441,681	68%	1,931,983	72%	2,208,645	65%
Fundraising	496,014	23%	364,768	14%	588,513	17%
Management and general	173,339	8%	363,446	13%	537,377	16%
Total cash expenses	\$2,111,034		\$2,660,197		\$3,334,535	
Non-cash expenses						
In-kind	20,175	1%	26,986	1%	70,608	2%
Depreciation	3,500	0%	12,332	0%	13,572	0%
Total non-cash expenses	\$23,675		\$39,318		\$84,180	
<b>Total Expenses</b>	<b>\$2,134,709</b>		<b>\$2,699,515</b>		<b>\$3,418,715</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$3,875,466</b>		<b>-\$384,487</b>		<b>\$113,934</b>	

**2009**

**Point Foundation  
Standard Annual Report**

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**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
10	80%	20%	10%	\$10,000 give or get	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	90%	10%	0%	0%

Point Foundation  
5757 Wilshire Blvd, Suite 370  
Los Angeles, CA 90036  
323-933-1234  
www.pointfoundation.org

Additional Locations

New York

Legal Names

Point Foundation - 501(c)(3)

Contact

Jorge Valencia  
Executive Director & CEO  
info@pointfoundation.org

**Senior Management Profile**

	<u>Lowest</u>	<u>Average</u>	<u>Highest</u>
Tenure with the organization	1.7	3.0	4.8
Compensation	\$91,800	\$123,363	\$183,291

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
12	11	1	75%	25%	8%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
8%	0%	75%	17%	0%	0%

*Note: Board and staff data as of 6/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

In January 2007, having accrued the necessary operating reserve, the Board of Directors made a decision to access the reserve to fund the growth and infrastructure of the organization. The strategic decision called for approving a budgeted deficit in operations for FY2007/2008 to be funded by this reserve. In this two year plan, Point Foundation would increase program services by doubling the # of scholars, and in order to sustain that growth we would make an investment in the infrastructure. The infrastructure plan is twofold. Step one was to move away from a virtual office environment and establish headquarter offices in LA. The second step is to invest in a development team to increase Point's fundraising capacity to match the growth in program. Due to this infrastructure investment, Point Foundation experienced both a planned loss in operations for the fiscal year ending June 30, 2008, and a planned increase in the administrative and fundraising expenses, thus decreasing the % of programmatic expenses to 66% of total expenses for the year.



**2009**

**Resource Center of Dallas  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1983	North Texas
<i>Fiscal Year</i>	<i>Type</i>
Oct - Sep	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$4,633,717	49
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

To serve the GLBT and North TX communities by providing support to GLBT individuals and organizations; health, HIV, and social services; and education and advocacy.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Fulfill the needs of the agency by cultivating an effective Board and optimizing staff productivity.
2. Establish the agency as a recognized leader by developing diversified funding, creating development infrastructure, and branding and marketing our vision.
3. Develop innovative programs to meet community needs by creating staff buy-in, assessing community needs, and evaluating service relevance and needs.
4. Construction of a new facility, approximately 40,000 square feet, with all GLBT services and HIV/AIDS services under one roof.

One-year Key Planned Accomplishments for FY2009

1. Cultivate new board leadership representing our diverse community.
2. Continue to build partnerships with corporations to foster at-large community support. Develop new sources of support to diversify funding.
3. Develop new GLBT programs, particularly for women, transgender people, and seniors. Expand existing GLBT programs, including the workforce development program, diversity training in the business community, and cultural needs assessment services.
4. Complete 2nd phase of initiation of capital campaign for new facility, continued leadership and major donor cultivation, completion of the design of the building, and continued marketing development.

Key Accomplishments in FY2008

1. Purchased land for new building, engaged architect, and completed design drawings and models.
2. Engaged marketing firm and implemented new marketing plan for both general marketing and that related to new building.
3. Expanded diversity education program to include teaching curriculum regularly presented at area universities. Expanded Gay Bingo, which funds GLBT programs, to 500 attendees (from 300). Developed new activities associated with JEWEL (Joining and Educating Women and Empowering Leaders), GEAR (Gender Education and Advocacy Resources), and GAIN (GLBT Aging Interest Network).

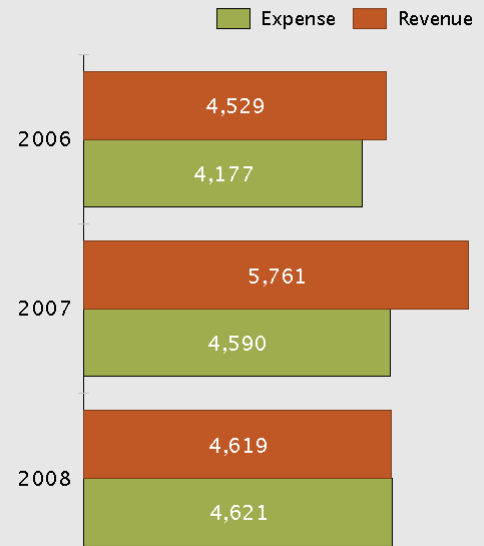
Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Indicators of Financial Health & Efficiency**

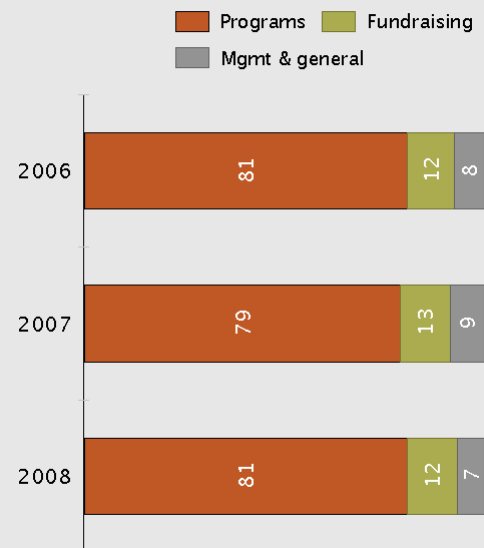
For the fiscal year ending September 30

<u>Ratios of Financial Health</u>	2006	2007	2008
Liquidity ratio	2.7	2.8	1.1
Days of working capital	83	88	57
Working capital (\$000)	\$906	\$1,033	\$686
Average daily cash expense (\$000)	\$10.8	\$11.7	\$12.1
Fundraising expense (cash only) to raise \$1	\$0.12	\$0.08	\$0.13
Total revenue raised through development efforts (\$000)	\$4,135	\$5,327	\$4,290
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	960	902	926
Number of individual donors who gave > \$1,000	89	74	83
Donor turnover (gave > \$35 in prior FY & not this FY)	62%	49%	51%
Number of individuals attending fundraising events (paid > \$100 per person)	790	650	720
Percent of total revenue from top 10 contributors	30%	31%	41%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 21,240	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$429,341	\$847,918	\$830,343
Net cash provided (used) by operating activities	481,338	527,946	124,869
Net cash provided (used) by investing activities	-62,761	-545,521	-733,870
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$418,577	-\$17,575	-\$609,001
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$847,918</u>	<u>\$830,343</u>	<u>\$221,342</u>

**2009**

**Resource Center of Dallas  
Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006	<i>Audited</i> 2007	<i>Audited</i> 2008
<i>Assets</i>			
Cash and cash equivalents	\$847,918	\$830,343	\$221,342
Investments	144,690	1,120,823	1,463,064
Other current assets	398,280	535,577	638,701
Net fixed assets	1,229,834	1,213,481	3,231,010
Other long-term assets	36,574	0	118,285
<b>Total Assets</b>	<b>\$2,657,296</b>	<b>\$3,700,224</b>	<b>\$5,672,402</b>
<i>Liabilities</i>			
Current liabilities	\$303,152	\$280,394	\$314,355
Long-term debt	105,763	0	1,746,100
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$408,915</b>	<b>\$280,394</b>	<b>\$2,060,455</b>
<i>Net Assets</i>			
Unrestricted	2,066,205	2,246,709	2,111,209
Temporarily restricted	0	0	177,617
Permanently restricted	182,176	1,173,121	1,323,121
<b>Total Liabilities and Net Assets</b>	<b>\$2,657,296</b>	<b>\$3,700,224</b>	<b>\$5,672,402</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<i>Support &amp; Revenue</i>						
Individual contributions	\$485,334	11%	\$309,689	5%	\$542,084	12%
Bequests	27,917	1%	1,045,292	18%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	170,026	4%	264,520	5%	189,715	4%
Foundation contributions	117,395	3%	250,990	4%	187,556	4%
Corporate contributions/Non-event sponsorships	253,917	6%	124,012	2%	138,227	3%
Government funding	3,002,235	66%	3,219,519	56%	3,159,329	68%
Program income	253,870	6%	232,800	4%	207,046	4%
Fundraising event income	114,450	3%	122,494	2%	78,663	2%
Less costs of direct benefit to donors	-8,785	-0%	-9,402	-0%	-6,038	-0%
Net fundraising event income	\$105,665		\$113,092		\$72,625	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	7,383	0%	17,598	0%	-37,917	-1%
Other revenue	105,663	2%	183,759	3%	159,867	3%
<b>Total Revenue</b>	<b>\$4,529,405</b>		<b>\$5,761,271</b>		<b>\$4,618,532</b>	
<i>Expenses</i>						
Program services	3,156,628	76%	3,458,775	75%	3,521,345	76%
Fundraising	489,329	12%	416,766	9%	571,212	12%
Management and general	313,803	8%	397,565	9%	320,625	7%
Total cash expenses	\$3,959,760		\$4,273,106		\$4,413,182	
Non-cash expenses						
In-kind	170,026	4%	264,520	6%	189,715	4%
Depreciation	47,551	1%	52,196	1%	18,288	0%
Total non-cash expenses	\$217,577		\$316,716		\$208,003	
<b>Total Expenses</b>	<b>\$4,177,337</b>		<b>\$4,589,822</b>		<b>\$4,621,185</b>	
Capital campaign net revenue	0		0		194,769	
<b>Change in Net Assets</b>	<b>\$352,068</b>		<b>\$1,171,449</b>		<b>\$192,116</b>	

**2009**

**Resource Center of Dallas  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
15	53%	47%	0%	\$5,000 per year	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	93%	7%	0%	0%

Resource Center of Dallas  
PO Box 190869  
Dallas, TX 75219  
214-528-0144  
www.rcdallas.org

Additional Locations

None

Legal Names

Resource Center of Dallas, Inc. - 501(c)(3)

Contact

Mike McKay  
Executive Director  
mmckay@rcdallas.org

**Senior Management Profile**

	<u>Lowest</u>	<u>Average</u>	<u>Highest</u>
Tenure with the organization	1.5	4.9	13.0
Compensation	\$72,000	\$84,688	\$107,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
49	43	6	35%	65%	4%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
19%	0%	59%	22%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

For additional information, please contact the Resource Center of Dallas or visit our website at [www.rcdallas.org](http://www.rcdallas.org).

Executive Director, Mike McKay  
Co-Executive Director-GLBT Programs, Cece Cox  
Media Contact, Rafael McDonnell  
Board President, Reid Ainsworth  
Financial Officer, Dave Hesse

**2009**

**The San Diego LGBT Community Center  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1973	San Diego County
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$3,887,350	49
<i>Tax Status*</i>	

501(c)(3)	100%
501(c)(4)	0%

\* Percent of latest FY revenue.

**Mission**

Enhance and sustain the health and well-being of the LGBT and HIV communities by providing activities, programs, and services that: Create community; Empower community members; Provide essential resources; Advocate for civil and human rights; and Embrace, promote, and support our cultural diversity.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

During the time period 2010-2014 The San Diego LGBT Community Center will:

1. Conduct a long-term strategic planning process from FY 2010 – FY2011. During this time period the research will include key benchmark data and systematic input from all key stakeholder groups.
2. FY2011 – FY2012: Develop, approve and begin execution of detailed implementation plans based upon the data collected and to include a focus upon new financial realities, long-term fiscal sustainability and sustaining organizational capacity to execute the developed plans.
3. FY2012 –FY2014: Fully implement the approved plan for implementation.

One-year Key Planned Accomplishments for FY2010

During the time period FY 2010-2011 The San Diego LGBT Community Center will:

1. Conduct a long-term strategic planning process from FY 2010 – FY2011. During this time period the research will include key benchmark data and systematic input from all key stakeholder groups.
2. Additionally The Center will continue to provide the current services, including:
  - **Youth Services** - Increase the # of homeless and recently homeless LGBT youth successfully accessing mental health and substance abuse treatment services by 25%.
  - **Family Services** - Continue to increase the availability of services and activities to LGBT and LGBT-affirmative families.
  - **Senior Services** - Complete the assessment of the needs for affordable LGBT senior housing in San Diego County.
  - **Latino Services** - Develop and implement a plan to expand family support and educational services for LGBT Latino families by increasing the # of Spanish-speaking family support groups, parenting workshops, and equality workshops offered.

Key Accomplishments in FY2009

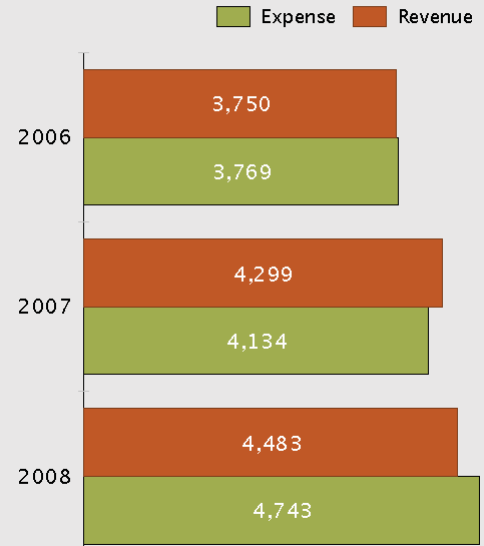
1. **Youth Services** - Increased # of homeless LGBT youth accessing primary care by 25%. Continued partnership with local providers for dental care for homeless LGBT youth, which has increased access by 50%.
2. **Family Services** - Increased # of families connected to community and services by an additional 20%.
3. **Senior Services** - Began community discussions regarding the need for affordable LGBT senior housing in SD and contracted for local needs assessment.
4. **Latino Services** - First PFLAG-style, monolingual (Spanish) family support group established for families of LGBT community members. Expanded HIV outreach and prevention services.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

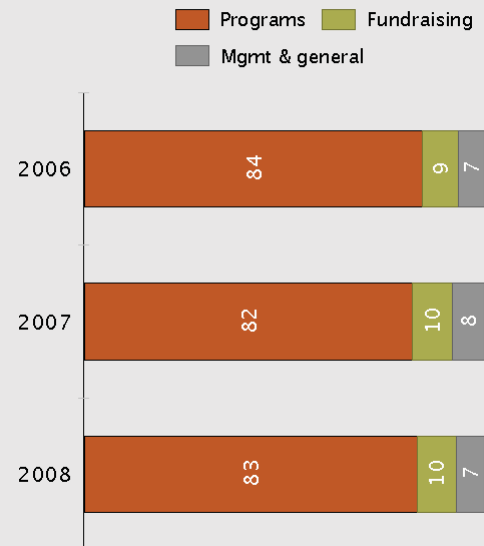
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	3.7	2.8	2.8
Days of working capital	94	91	76
Working capital (\$000)	\$944	\$1,001	\$948
Average daily cash expense (\$000)	\$10.0	\$11.0	\$12.4
Fundraising expense (cash only) to raise \$1	\$0.18	\$0.19	\$0.17
Total revenue raised through development efforts (\$000)	\$1,840	\$2,152	\$2,720
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	1,028	1,399	2,088
Number of individual donors who gave > \$1,000	131	140	135
Donor turnover (gave > \$35 in prior FY & not this FY)	34%	39%	36%
Number of individuals attending fundraising events (paid > \$100 per person)	622	767	708
Percent of total revenue from top 10 contributors	48%	40%	57%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 19,568	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$911,159	\$461,165	\$659,647
Net cash provided (used) by operating activities	148,200	598,734	-75,761
Net cash provided (used) by investing activities	-995,227	-402,192	62,580
Net cash provided (used) by financing activities	397,033	1,940	-41,965
Net increase (decrease) in cash	-\$449,994	\$198,482	-\$55,146
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$461,165</u>	<u>\$659,647</u>	<u>\$604,501</u>

**2009**

# The San Diego LGBT Community Center

## Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<b>Assets</b>					
Cash and cash equivalents	\$461,165		\$659,647		\$604,501
Investments	545,653		655,768		399,217
Other current assets	333,823		299,423		454,482
Net fixed assets	6,128,106		6,279,988		6,270,886
Other long-term assets	128,893		28,389		11,389
<b>Total Assets</b>	<b>\$7,597,640</b>		<b>\$7,923,215</b>		<b>\$7,740,475</b>
<b>Liabilities</b>					
Current liabilities	\$223,326		\$384,884		\$269,007
Long-term debt	5,919,039		5,918,118		5,874,695
Other long-term liabilities	0		0		236,216
<b>Total Liabilities</b>	<b>\$6,142,365</b>		<b>\$6,303,002</b>		<b>\$6,379,918</b>
<b>Net Assets</b>					
Unrestricted	1,265,026		1,358,509		1,084,454
Temporarily restricted	17,241		33,195		34,476
Permanently restricted	173,008		228,509		241,627
<b>Total Liabilities and Net Assets</b>	<b>\$7,597,640</b>		<b>\$7,923,215</b>		<b>\$7,740,475</b>

### Statement of Activities

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$728,242	19%	\$777,095	18%	\$968,910	22%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	172,920	5%	157,475	4%	403,097	9%
Corporate contributions/Non-event sponsorships	146,701	4%	239,545	6%	306,984	7%
Government funding	1,726,368	46%	1,956,736	46%	1,552,485	35%
Program income	664,301	18%	870,227	20%	896,401	20%
Fundraising event income	246,643	7%	262,939	6%	324,706	7%
Less costs of direct benefit to donors	-40,515	-1%	-52,645	-1%	-95,393	-2%
Net fundraising event income	\$206,128		\$210,294		\$229,313	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	25,111	1%	50,289	1%	18,789	0%
Other revenue	79,887	2%	37,262	1%	107,022	2%
<b>Total Revenue</b>	<b>\$3,749,658</b>		<b>\$4,298,923</b>		<b>\$4,483,001</b>	
<b>Expenses</b>						
Program services	3,126,670	83%	3,314,681	80%	3,868,650	82%
Fundraising	338,440	9%	417,202	10%	461,809	10%
Management and general	185,382	5%	271,523	7%	208,126	4%
Total cash expenses	\$3,650,492		\$4,003,406		\$4,538,585	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	118,225	3%	130,579	3%	204,073	4%
Total non-cash expenses	\$118,225		\$130,579		\$204,073	
<b>Total Expenses</b>	<b>\$3,768,717</b>		<b>\$4,133,985</b>		<b>\$4,742,658</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$19,059</b>		<b>\$164,938</b>		<b>-\$259,657</b>	

**2009**

**The San Diego LGBT Community Center  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
16	69%	31%	0%	100% of the board participates in fundraising activities and the basic board give or get; minimum is \$5,000 per year.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	62%	38%	0%	0%

The San Diego LGBT Community Center  
PO Box 3357  
San Diego, CA 92163  
619-692-2077  
www.thecentersd.org

Additional Locations

None

Legal Names

**Senior Management Profile**

The San Diego Lesbian, Gay, Bisexual, Transgender Community Center - 501(c)(3)  
The Center Advocacy Project - 501(c)(4)

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	2.0	6.0	10.0
Compensation	\$60,000	\$92,000	\$160,000

**Paid Staff**

Contact

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
49	40	9	42%	58%	2%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
9%	0%	55%	29%	4%	3%

Dr. Delores A. Jacobs  
Chief Executive Officer  
djacobs@thecentersd.org

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

**Youth Housing Project** - In FY2005, The San Diego LGBT Community Center completed the layered financing package for the acquisition of a new building for our new supportive housing program for LGBT homeless youth. The Youth Housing Project is financed with 3 sources of public funds. Terms of the loans require The Center to operate the building as housing for homeless youth for a period of at least 55 years. The loans are at 3%, with principal and interest deferred for the 55-year period. Note the entry of \$236,000 under long-term liabilities for this year. In an abundance of caution, this entry reflects the accumulated 3% interest on this project. However, in subsequent years, and as a result of clarified documentation regarding the forgiveness of these loans, this interest entry is reduced to the largest of the 2 loan sources comprising this financing package.

**2009**

**San Francisco LGBT Community Center**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1996	San Francisco
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,853,839	22
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Provide space and programs that welcome the entire San Francisco (SF) LGBT community and its allies; unite the community across lines of age, race, gender and economics; give visibility to the history, culture, and diversity of SF's LGBT community; organize and plan the political and cultural future for SF's LGBT community; and nurture new organizations and programs to meet emerging community needs.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Economic Development** - Increase # and frequency of workshops and events in the areas of workforce development, individual and family financial growth and development, and entrepreneur and small business owners' support. Institutionalize Transgender Economic Empowerment Initiative (TEEI), increasing # and capacity of partners and expanding outreach. Complete program planning for LGBT first-time home buyers program. Create a how-to manual to support replication of these programs in other communities.
- Children, Youth and Families** - Evaluate Castro Network effectiveness. Develop and implement job training and support services specifically for LGBTQQ youth. Increase # and availability of workshops, training and support for LGBT children and families; increase childcare provision and introduce parent/child classes. Expand youth empowerment programs to include more opportunities for leadership development, including internships.
- Health and Wellness** - Broaden SF Newcomer Assistant Program (SNAP) to include women and transgender individuals. Expand community participation in Center's open house. Introduce community-wide workshop series on health and wellness.
- Arts and Culture** - Increase # and frequency of visual arts and performing arts showcases. Introduce lecture series focusing on local, national and international LGBT issues and leaders.
- Community and Policy Initiatives** - Increase staff capacity to respond to community-led initiatives and # of active initiatives. Develop initiatives that build bridges to non-LGBT communities. Develop programming to promote civic engagement. Create Policy Director position.
- Capacity and Organizational Growth** - Realign current services and prioritization of new program areas; improving marketing communications strategies; build fundraising capacity with focus on increasing the number of individual donors and implementing planned giving program; and resolve capital debt and maximize value of building and other assets.

One-year Key Planned Accomplishments for FY2010

- Economic Development** - Conduct 3 LGBT job fairs, 140 individual career counseling sessions, 50 weekly job search clinics, 5 employment workshops, 6 financial growth and development workshops and 1 all-day resource fair. Place 25 job seekers in living-wage jobs. Provide technical assistance (TA) to 44 small businesses and conduct 12 monthly small business workshops and 3 sessions of 5-week "business plan loan factory" workshop series. Approve 9 loan packages and cut neighborhood commercial vacancy rates. Within TEEI, provide program information to 200 clients, place 38 job seekers in living-wage jobs, and facilitate peer-mentoring of 25 clients. Hold pre-home purchase orientations for 40 low-income community members.

**2009**

**San Francisco LGBT Community Center**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

2. **Children, Youth and Family** - Bring together neighborhood children, youth and family providers in Castro Network. For at-risk LGBTQ youth (age 16 to 24), provide weekly meal night for homeless and marginally housed youth; conduct 53 workshop sessions on digital storytelling, visual and performing arts skills development and self-expression; host 2 public performances and/or art installations; host annual Queer Youth Prom; and provide intensive job training for 1 youth intern. For parents and families, provide free drop-in childcare 17 hours/week; host 2 parent/child development classes; and participate in SF LGBT Family Collaborative.
3. **Health and Wellness** - Continue SF Newcomer's Assistance Program (SNAP) to support health of GBT men moving to SF through 340 1-on-1 counseling sessions, 16 workshops, placement of 24 peer mentors/buddies, update and reprint annual newcomer's guide, and monthly queer men's wellness discussion forum.
4. **Arts and Culture** - Host 5 visual art exhibitions by individual artists and/or community partners; produce 4 performances or cultural activities featuring LGBT artists or groups; and produce or host lectures, workshops, visual arts showcases and performances reflecting issues relevant to SF LGBT community.
5. **Community and Policy Initiatives** - Support current initiatives, including Center Women Present and SF-TEAM; collaborate to sponsor 2 Latina/o Community events; develop and formalize guidelines fundraising and marketing for community initiatives; and collaborate in state/national efforts on marriage equality, employment discrimination and other LGBT civil rights issues. Respond to legal, civic and/or political issues that impact the LGBT communities as they emerge and provide 5,000 referrals to 800+ LGBT resources.
6. **Building Facility Services** - Host 200+ events monthly; provide offices for 13 nonprofit tenants; and provide public with free computer access (David Bohnett CyberCenter), classrooms, computer lab, reading room, and drop-in childcare.

Key Accomplishments in FY2009

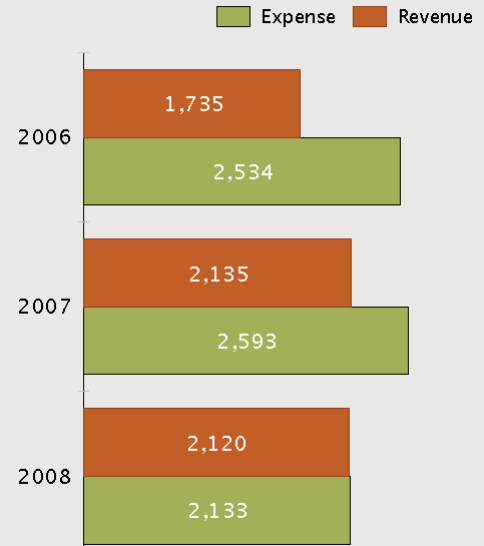
1. **Economic Development** - Hosted 2nd annual Economic Empowerment Day; placed 31 transgender people and 23 LGBT people in jobs through TEEI and Workforce Development Program, respectively; packaged 9 small business loan applications; attracted 8 and retained 3 businesses through Castro Neighborhood Business Attraction Campaign; and reenergized SF Economic Development Alliance.
2. **Children, Youth and Families** - Provided free onsite childcare 23 hours/week (500 visits); hosted 2nd annual youth prom (300+ attendees); continued youth digital storytelling class, youth meal night and youth internship program; and conducted 20 sessions of art skills/self-expression development workshops.
3. **Health and Wellness** - In SNAP, provided 35 educational workshops, 350 counseling sessions, and information/outreach to 1208 people.
4. **Arts and Culture** - Hosted visual arts showcases, performances, and literary events featuring works of LGBTQ artists.
5. **Community and Policy Initiatives** - Supported 3 community-led initiatives; hosted events including viewings of Supreme Court oral arguments on Prop 8 and Presidential inauguration celebration; continued to support United ENDA; and participated in No on 8 campaign committee. Co-chaired SF County local action committee and hosted townhall meetings, community forums and workgroups that connected campaign and policy makers to community at large and actively fundraised for No on 8.
6. **Building Facility Services** - Installed new computers in CyberCenter and provided rental space for 3000 events and office space for 12 LGBT nonprofits.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

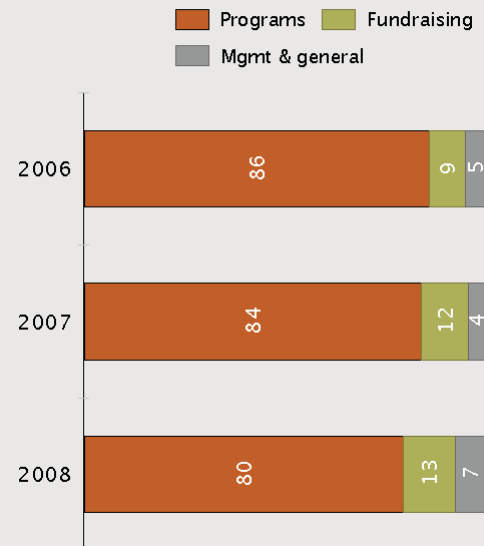
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.1	0.1	0.1
Days of working capital	41	17	17
Working capital (\$000)	\$225	\$101	\$94
Average daily cash expense (\$000)	\$5.5	\$5.8	\$5.6
Fundraising expense (cash only) to raise \$1	\$0.25	\$0.30	\$0.35
Total revenue raised through development efforts (\$000)	\$876	\$996	\$782
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	540	361	598
Number of individual donors who gave > \$1,000	83	59	72
Donor turnover (gave > \$35 in prior FY & not this FY)	80%	64%	N/A
Number of individuals attending fundraising events (paid > \$100 per person)	255	113	147
Percent of total revenue from top 10 contributors	25%	16%	21%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 8,017	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Audited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$14,712	\$16,439	\$20,146
Net cash provided (used) by operating activities	-182,224	97,303	90,636
Net cash provided (used) by investing activities	-1,049	-197,301	-75,348
Net cash provided (used) by financing activities	185,000	103,705	27,820
Net increase (decrease) in cash	\$1,727	\$3,707	\$43,108
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$16,439</u>	<u>\$20,146</u>	<u>\$63,254</u>

**2009**

**San Francisco LGBT Community Center**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$16,439		\$20,146		\$63,254
Investments	0		0		0
Other current assets	402,098		470,449		500,592
Net fixed assets	11,307,015		11,041,930		11,072,186
Other long-term assets	23,090		3,066		2,892
<b>Total Assets</b>	<b>\$11,748,642</b>		<b>\$11,535,591</b>		<b>\$11,638,924</b>
<b>Liabilities</b>					
Current liabilities	\$193,387		\$389,893		\$469,429
Long-term debt	3,150,000		3,198,548		3,184,118
Other long-term liabilities	0		0		51,639
<b>Total Liabilities</b>	<b>\$3,343,387</b>		<b>\$3,588,441</b>		<b>\$3,705,186</b>
<b>Net Assets</b>					
Unrestricted	8,385,496		7,792,542		7,844,325
Temporarily restricted	19,759		154,608		89,413
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$11,748,642</b>		<b>\$11,535,591</b>		<b>\$11,638,924</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$425,185	25%	\$253,192	12%	\$210,340	10%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	11,535	1%	137,909	6%	60,367	3%
Foundation contributions	287,953	17%	309,907	15%	357,475	17%
Corporate contributions/Non-event sponsorships	112,084	6%	257,045	12%	135,700	6%
Government funding	569,035	33%	749,297	35%	986,722	47%
Program income	289,442	17%	387,963	18%	317,285	15%
Fundraising event income	57,250	3%	49,850	2%	27,181	1%
Less costs of direct benefit to donors	-17,993	-1%	-11,845	-1%	-9,498	-0%
Net fundraising event income	\$39,257		\$38,005		\$17,683	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	542	0%	2,075	0%	33,951	2%
<b>Total Revenue</b>	<b>\$1,735,033</b>		<b>\$2,135,393</b>		<b>\$2,119,523</b>	
<b>Expenses</b>						
Program services	1,671,802	66%	1,723,442	66%	1,642,340	77%
Fundraising	214,969	8%	297,967	11%	275,486	13%
Management and general	120,031	5%	109,703	4%	141,670	7%
Total cash expenses	\$2,006,802		\$2,131,112		\$2,059,496	
Non-cash expenses						
In-kind	11,535	0%	0	0%	28,347	1%
Depreciation	515,504	20%	462,386	18%	45,092	2%
Total non-cash expenses	\$527,039		\$462,386		\$73,439	
<b>Total Expenses</b>	<b>\$2,533,841</b>		<b>\$2,593,498</b>		<b>\$2,132,935</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$798,808</b>		<b>-\$458,105</b>		<b>-\$13,412</b>	

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**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
12	50%	50%	0%	Each board member makes and individual gift and board commits to annual goal to collectively raise a minimum of \$10,000 per board member.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
8%	8%	67%	17%	0%	0%

**Locations & Contact**

San Francisco LGBT Community Center  
1800 Market St.  
San Francisco, CA 94102  
415-865-5520  
www.sfcenter.org

Additional Locations

None

Legal Names

Community Center Project of San Francisco - 501(c)(3)

Contact

Rebecca Rolfe  
Executive Director  
rebeccar@sfcenter.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.0	4.4	7.0
Compensation	\$70,000	\$86,300	\$108,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
22	19	3	59%	41%	27%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
18%	18%	41%	18%	5%	0%

*Note: Board and staff data as of 7/31/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

The San Francisco LGBT Community Center (the Center) opened its doors to the public in March 2002. In our 1st years of operation we faced several serious challenges. Today we celebrate many significant accomplishments, addressing many of these early challenges, including:

- 1. Effective Business Plan** - When we opened our doors in 2002, we were primarily a large building, filled with activities produced by other organizations. This was an intentional response to the intensive demand for low-cost office and event space created by the Bay Area's booming dot-com economy of the 1990s and early 2000s. The subsequent intensive economic downturn affected the San Francisco Bay Area more deeply and for a longer period of time than the rest of the country. Office and event space was suddenly widely available and for little and sometimes no cost. The original business plan, which estimated significant rental revenue, turned out to be inaccurate. In 2003, we completely revised this plan, basing new efforts on a mix of rental tenancy and room-rate restructuring as well as a service-rich menu of Center activities (see programs and services below). Over the past 6 years we have implemented this plan, introducing new programs as we identify funding and working to maximize rental income. As a result of these efforts, we ended the past two fiscal years with slightly greater income than operating expenses.
- 2. Clear Programs and Services that Benefit the Community** - As stated above, the Center began with a model of providing space and accommodations for other community organizations. We built extensive programming to meet the needs of the San Francisco Bay Area LGBT community, focusing efforts in the areas of: economic development; children, youth and families; health and wellness; arts and culture; community and policy initiatives; and, effective use of the 35,000 square foot Charles M. Holmes Campus. We are particularly proud of the groundbreaking nature of much of our

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

programming, including the 1st ever LGBT economic development program, free drop-in childcare, an innovative HIV prevention program geared to the needs of GBT men moving to the Bay Area, and the Transgender Economic Empowerment Initiative, designed to support sustainable employment for the transgender community. All programming has been developed in response to gaps in or lack of services. Most programming includes effective collaborations with other community-based organizations.

3. **Infrastructure** - Over the past 7 years we have solidified our infrastructure to support our programs, including the additions of financial tracking and reporting systems, up-to-date computer and technology systems, and a strong leadership team. This infrastructure is critical to supporting the work of the organization. The ability to provide program statistics, financial information, and evaluations are vital to the Center's relationships with funders and community members.

4. **Financial Health** - At the time we finished building construction, we had an outstanding capital debt of \$3,000,000. We had a business plan that was not generating enough revenue to cover expenses. In the past 7 years, we have worked to reduce our overhead, increase building and program revenues, and increase our support from individuals, foundations, corporations and government agencies. We have been phenomenally successful in this area, increasing total revenue by over half in just 5 years, while reducing fundraising and administrative expenses by nearly one-fourth.

**Current Challenges**

We still face many challenges, including significant cash flow issues. These problems are clearly expressed in the liquidity ratio and working capital ratios contained in this report. We have renegotiated our outstanding capital debt into a longterm commercial loan, which will increase our financial stability. We continue to seek other opportunities to reduce the considerable costs of operating the building, such as the implementation of a recycling and composting program and the installation of solar panels which has decreased energy costs.

While we address these challenges, we continue to seek opportunities to build agency capacity. This includes planning in 4 key areas: a) Realignment of current services and prioritization of new program areas; b) Improving marketing communications strategies; c) Fundraising capacity building with a focus on individual giving; and, d) Strategies to resolve capital debt and maximize value of building and other assets.

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
<b>1993</b>	<b>National</b>
<i>Fiscal Year</i>	<i>Type</i>
<b>Jan - Dec</b>	<b>Issue</b>
<i>2009 Budget</i>	<i>Total Paid Staff</i>
<b>\$2,942,258</b>	<b>13</b>
<i>Tax Status*</i>	
<b>501(c)(3)</b>	<b>100%</b>

\* Percent of latest FY revenue.

**Mission**

End discrimination against, and harassment of, military personnel affected by Don't Ask, Don't Tell (DADT) and related forms of intolerance, via national nonprofit legal services, watchdog activities and policy advocacy.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- Overtorn existing federal law** preventing gays, lesbians, and bisexuals from serving openly in the military and replace with a non-discrimination policy.
- Provide free legal services** to service members harmed by DADT and related discriminatory policies.
- Advocate for policies and practices** that will reduce harassment of LGBT service members and will improve the lives of service members perceived to be LGBT while they continue to serve under DADT.
- Mobilize allies and new constituents** to support repeal and advocate for the right to serve without discrimination.
- Strengthen organizational capacity** to operate under the highest ethical and administrative standards through the adoption, improvement and implementation of policies such as term limits for members of the Board of Directors, Director position description, core values, code of ethics and whistle-blower protection, anti-harassment, Director performance self-assessment, Director annual review of performance, confidentiality, conflict of interest, diversity, nondiscrimination, fundraising standards, document retention, computer software piracy, investment, organizational branding, data protection, salary administration, etc.

One-year Key Planned Accomplishments for FY2009

- Build support for passage of the Military Readiness Enhancement Act (MREA)** by obtaining 200 House cosponsors and 15 Senate cosponsors; and advocating for House and Senate committee or subcommittee hearings. Prepare for re-introduction of MREA in the House and introduction of a Senate companion bill.
- Provide legal services with skill, integrity and foresight.** Respond to 800 requests for assistance; represent 150 new clients; and provide 175 service members with legal consultation.
- Hold 7th annual Lobby Day** with emphasis on visibility, large #s and getting an information packet to every targeted Congressional office; deploy groups of volunteers with trained Lobby Day leaders to 125 targeted meetings with key offices; and conduct a large Capitol Hill rally.
- Advocate for changes to regulations and policies impacting LGBT service members.** Perform education and outreach with military lawyers so they better understand DADT implementing regulations, security clearance regulations, HIV-related regulations and regulations impacting transgender service members.

**2009**

## **Servicemembers Legal Defense Network (SLDN)**

### **Standard Annual Report**

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#### Key Accomplishments in FY2008

1. **Advocating to Lift the Ban:**

- Conducted 58+ meetings with Congressional offices to educate and inform key staff on "Don't Ask, Don't Tell" and the campaign to repeal the law. .
- Added 10 additional cosponsors to HR 1246 by year's end for a total of 149 - the most cosponsorship since legislation to repeal "Don't Ask, Don't Tell" was first introduced. Worked side by side with House Armed Services Committee members in preparing for the first hearing in 15 years on repealing "Don't Ask, Don't Tell," held in the Subcommittee on Personnel on July 23, 2008. Two members of the SLDN Military Advisory Council, retired Army Major General Vance Coleman and retired Navy Captain Joan Darrah, testified at the hearing, giving expert advice, counsel and testimony for the repeal of DADT.; 5th annual Lobby Days brought 228 people representing 23 states to Capitol Hill for rally and drop-by visits with every Congressional office
- Obtained numerous mainstream media articles on DADT, culminating in CBS 60 Minutes' 12/16/07 airing of Sgt. Darren Manzella's story of open Army service.

2. **Providing Free Legal Services** - Responded to almost 680 requests for assistance and represented 202 new clients.

3. **Publications** - Published Stories from the Front Lines (stories of LGBT veterans who have recently served in Iraq and Afganistan), revised and republished service member "rights card," and for the first time created and published a "Pocket Survival Guide" for distribution to LGBT service members.

4. **Protecting Service Members from Harrassment:** Continued to aggressively protect clients who are experiencing harassment through direct advocacy with individual commands and individual services. Conducted trainings for military defense counsel on trends in DADT legal services work and criminal prosecution of consensual sodomy in the military. Performed outreach with Navy legal officers regarding security clearance protections for LGBT service members and prevented Navy from issuing new enlistment forms that would have harmed LGBT service members. Worked to promote chaplain and allied health professional confidentiality for LGBT service members.

5. **Advocating for Policies and Practices:** Continued to work with law school campuses to encourage advocacy for DADT repeal. Multiple schools funded student attendance at SLDN's Lobby Days and committed to funding future trips to SLDN's annual Lobby Days. Established working group to develop plan for regulatory change regarding transgender service.

6. **Mobilize Service Members and Veterans to work for repeal of DADT:** Continued outreach to former high-ranking service members focused on educating former colleagues in the Pentagon leadership and the general public about DADT repeal.

# 2009 Servicemembers Legal Defense Network (SLDN) Standard Annual Report

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## Indicators of Financial Health & Efficiency

For the fiscal year ending December 31

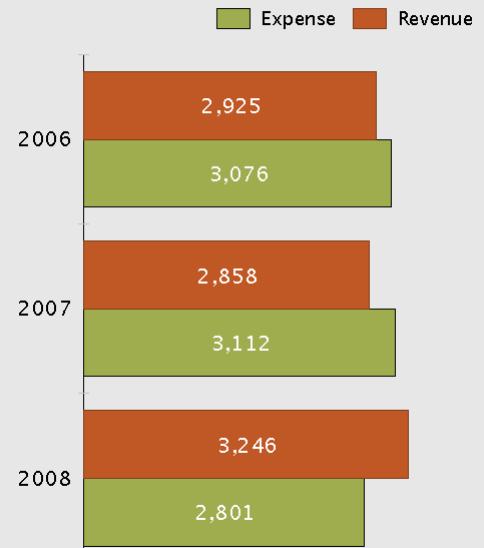
### Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	3.6	1.8	1.7
Days of working capital	124	70	78
Working capital (\$000)	\$689	\$494	\$492
Average daily cash expense (\$000)	\$5.5	\$7.1	\$6.4
Fundraising expense (cash only) to raise \$1	\$0.08	\$0.09	\$0.15
Total revenue raised through development efforts (\$000)	\$2,898	\$2,834	\$3,236

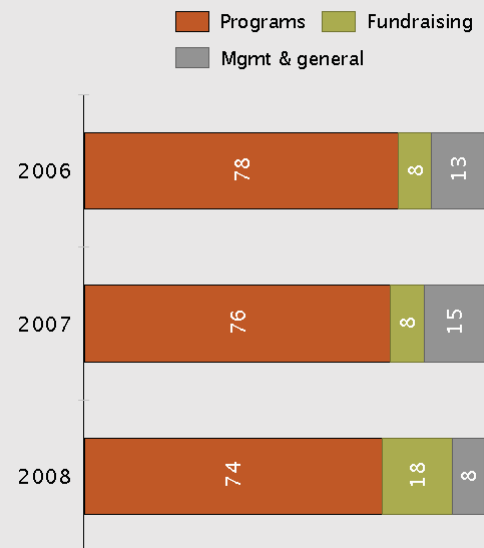
### Indicators of Contributor Base

Number of individual donors who gave > \$35	2,574	2,027	2,109
Number of individual donors who gave > \$1,000	189	156	96
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	60%	63%
Number of individuals attending fundraising events (paid > \$100 per person)	850	950	649
Percent of total revenue from top 10 contributors	29%	36%	32%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 109,786	

### Revenue -vs- Expense (\$000)



### Expense Percentage



## Statement of Cash Flows

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$462,242	\$424,033	\$284,491
Net cash provided (used) by operating activities	-31,161	-122,544	-32,319
Net cash provided (used) by investing activities	0	-9,950	-233,370
Net cash provided (used) by financing activities	-7,048	-7,048	137,645
Net increase (decrease) in cash	<u>-\$38,209</u>	<u>-\$139,542</u>	<u>-\$128,044</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$424,033</u>	<u>\$284,491</u>	<u>\$156,447</u>

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**Statement of Financial Position**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$424,033		\$284,491		\$156,447
Investments	0		9,950		243,320
Other current assets	381,014		360,463		334,111
Net fixed assets	15,667		7,049		41,568
Other long-term assets	457,402		400,021		839,272
<b>Total Assets</b>	<b>\$1,278,116</b>		<b>\$1,061,974</b>		<b>\$1,614,718</b>
<b>Liabilities</b>					
Current liabilities	\$116,280		\$161,211		\$241,587
Long-term debt	7,049		0		27,098
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$123,329</b>		<b>\$161,211</b>		<b>\$268,685</b>
<b>Net Assets</b>					
Unrestricted	433,879		297,302		292,389
Temporarily restricted	720,908		603,461		1,053,644
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$1,278,116</b>		<b>\$1,061,974</b>		<b>\$1,614,718</b>

**Statement of Activities**

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$1,241,237	42%	\$1,629,642	57%	\$1,458,323	45%
Bequests	40,953	1%	124,668	4%	743,355	23%
Dues	0	0%	0	0%	0	0%
In-kind contributions	1,029,052	35%	513,600	18%	472,382	15%
Foundation contributions	572,028	20%	418,090	15%	440,070	14%
Corporate contributions/Non-event sponsorships	14,690	1%	147,595	5%	121,418	4%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	280	0%	0	0%	0	0%
Investment income	10,842	0%	4,254	0%	2,961	0%
Other revenue	16,124	1%	20,364	1%	7,773	0%
<b>Total Revenue</b>	<b>\$2,925,206</b>		<b>\$2,858,213</b>		<b>\$3,246,282</b>	
<b>Expenses</b>						
Program services	1,383,184	45%	1,860,141	60%	1,605,286	57%
Fundraising	244,981	8%	257,007	8%	487,671	17%
Management and general	397,323	13%	472,871	15%	224,846	8%
Total cash expenses	\$2,025,488		\$2,590,019		\$2,317,803	
Non-cash expenses						
In-kind	1,029,052	33%	513,600	17%	472,382	17%
Depreciation	21,616	1%	8,618	0%	10,827	0%
Total non-cash expenses	\$1,050,668		\$522,218		\$483,209	
<b>Total Expenses</b>	<b>\$3,076,156</b>		<b>\$3,112,237</b>		<b>\$2,801,012</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$150,950</b>		<b>-\$254,024</b>		<b>\$445,270</b>	

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Board Members						Locations & Contact
Total	Male	Female	Transgender	Fundraising Requirements		
20	60%	35%	5%	\$5,000 net first term; \$10,000 net successive terms		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	<u>Additional Locations</u> None
0%	5%	90%	5%	0%	0%	
Senior Management Profile						<u>Legal Names</u> Servicemembers Legal Defense Network - 501(c)(3)
			<u>Lowest</u>	<u>Average</u>	<u>Highest</u>	
Tenure with the organization			0.2	1.9	3.8	
Compensation			\$72,500	\$107,500	\$150,000	<u>Contact</u> Aubrey Sarvis Executive Director aubrey@sldn.org
Paid Staff						
Total	Full-Time	Part-Time	Male	Female	Transgender	
13	13	0	62%	38%	0%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
0%	8%	77%	15%	0%	0%	
<i>Note: Board and staff data as of 1/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i>						

**Organization's Notes and Advisories**

**Action Plan Summary FY2009**

- Lift the Ban** preventing gays, lesbians, and bisexuals from serving openly and honestly in the military.

**Lift the Ban-Lobbying**

- Introduce Senate bill to repeal DADT (Priority: High; Due Dates: 11/1/2009): 1) Coordinate Senate introduction of the Military Readiness Enhancement Act; 2) Coordinate original bipartisan support for the legislation if possible.
- Build support for passage of the Military Readiness Enhancement Act (Priority: High; Due Dates: 12/31/2009): 1) Obtain 200 House cosponsors on MREA; 2) Obtain 15 Senate cosponsors on MREA; 3) Advocate for committee or subcommittee hearing in the House and Senate if political climate is favorable; 4) Reach out to key caucuses and staff associations; 5) Prepare for re-introduction in the House and Senate (or for introduction if applicable) in the new Congress after elections.
- Hold 7th annual Lobby Day (Priority: High; Due Dates: 3/13/2009): 1) Conduct Lobby Day with emphasis on visibility and large numbers (100+ lobbyists) and reaching targeted Congressional offices with an information packet; 2) Train Lobby Day leaders to lead groups on Capitol Hill; 3) Conduct 125 targeted meetings with Key offices, staffed by trained Lobby Day leaders; 4) Conduct a rally in association with Lobby Day.
- Seek alternative legislative opportunities to repeal, defund, suspend or favorably modify DADT (Priority: High; Due Date: 12/31/2009).

**Lift the Ban-Ally Development**

- Continue to develop "Freedom to Serve" Roundtable as key inter-organizational coalition to repeal DADT. Participate in other organizational alliances and maintain contacts beyond Freedom to Serve Roundtable (Priority: High; Due Dates: 12/31/2009).

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**Lift the Ban-Grassroots**

- Build activist networks (Priority: High; Due Dates: 12/31/2009): 1) Add 25,000 names to online database; 2) Convert to new online database system and ensure smooth integration of databases; 3) Improve and expand online resources for SLDN online activists network; 4) Utilize podcasts to build activist network.
- Continue outreach to former high-ranking service members focused on educating former colleagues in the Pentagon leadership and the general public about DADT repeal.
- Develop Military Advisory Counsel (MAC) (Priority: High; Due Dates: Ongoing): 1) Work with existing MAC members to strategize ways to effectively use them as a resource to influence repeal debate; 2) assist MAC in recruiting new members for the counsel.

**Lift the Ban-Educate**

- Educate new Pentagon and leaders of each service branch about the application and impact of DADT(Priority: High; Due Dates: 12/31/2009).
- Publish FY2008 DADT discharge numbers and analysis (Priority: High; Due Dates: 6/30/2009).
- Create speakers bureau database and refresh names, add 10 former clients to speakers bureau database (Priority: Medium; Due Dates: 12/31/2009).
- Publish SLDN quarterly & annual reports (Priority: High; Due Dates: Ongoing).

**Lift the Ban-Litigation**

Pursue DADT litigation efforts with skill, integrity and foresight. Continue to monitor criminal prosecutions for consensual sodomy in each of the service branches. Submit amicus curiae briefs when appropriate. Engage in litigation on behalf of DADT clients as appropriate. (Litigation - Priority: High; Due Dates: Ongoing. Media/Communications - Priority: High; Due Dates: 24/7):

- Develop, execute communications strategy to move key lawmakers, win support of public in moveable middle, and maintain current levels (70+ percent) of public support for repeal
- Use political media to apply pressure to White House/Congress when appropriate
- Obtain, manage press for discharged service members, concentrating on telling personal stories
- Draft, submit 20 opinion pieces to national, local news organizations and key blogs
- Respond to opposition and media myths quickly, aggressively
- Integrate traditional/social media efforts
- Conduct numerous interviews on policy, litigation, legal services in all mediums
- Continue to build close relationships with reporters, bloggers
- Promote Frontlines, SLDN's blog in the blogosphere

**2. Provide Free Legal Services**

- Provide legal services with skill, integrity and foresight (Priority: High; Due Dates: 12/31/2009): 1) Provide legal services to 800; represent 150 new clients; provide 175 legal consults and increase outreach to service members; 2) Maintain average attorney case load of no more than 30 open cases.
- Develop and distribute updates of the latest version of Survival Guide (Priority: Medium; Due Dates:ongoing).
- Educate military defense attorneys about DADT's application and impact on LGBT service members (Priority: Low; Due Dates: ongoing).
- Educate legal officers in each of the service branches and throughout the Pentagon on issues impacting LGBT service members – including security clearance procedures, HIV regulations, regulations impacting transgender service members and other regulations impacted by DADT (Priority: Medium; Due Dates: Ongoing).
- Continue to manage and develop pro bono relationships with attorneys assisting with case work, legal research, and litigation (Priority: Medium; Due Dates: Ongoing).

**3. Protect Service Members** from harassment based on actual or perceived sexual orientation and/or gender identity.

- Advocate regulations that protect LGBT service members from harassment. Perform outreach with each of the service branches to advocate for inclusion of perceived sexual orientation in the EO regulations for each service. (Priority: Low; Due Dates: 12/31/2009): 1) Continue to work to place congressional pressure on DoD; 2) Request to do EO training with DoD and each of the service branches.

**2009**

**Servicemembers Legal Defense Network (SLDN)**

**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

4. **Advocate Military Policies and Practices** that improve service members' lives.

**Advocate Changes to Policy-Article 125**

- Lead Article 125 litigation effort with skill, foresight and integrity. Provide oral and written testimony to the Cox Commission - which will recommend changes to the UCMJ (Priority: High; Due Dates: July 2009).
- Pursue regulatory and legislative efforts to modernize/repeal Art. 125 (Priority: High; Due Dates: Ongoing).

**Advocate Changes to Policy-All**

- Establish working group to develop plan for regulatory change regarding transgender service (Priority: High; Due Dates: New).
- Pursue regulatory efforts to ensure DoD updates all service regulations (including AR 135-175) to be consistent with current DADT policy (Priority: Low; Due Dates: Ongoing).

5. **Support Service Member and Veteran Pride** as LGBT persons.

**Support Service Member Pride-Grow Community**

- Promote LGBT veteran visibility (Priority: Medium; Due Dates: Ongoing): 1) Promote LGBT and ally veteran visibility through documenting Courage, Stories from the Frontlines and other campaigns.

6. **Strengthen Organizational Capacity** to assure the freedom to serve in the most cost-effective, strategic fashion.

- Update SLDN strategic plan with new 3 year plan (Priority: High; Due Dates: 7/31/2009).
- Pursue strategies to broaden pool of pro bono assistance firms (Priority: Medium; Due Dates: Ongoing).
- Develop staff training and procedural materials (Priority: High; Due Dates: 12/31/2009).
- Pursue strategies to obtain interns and volunteers (Priority: Medium; Due Dates: 12/31/2009).
- Obtain clean audit opinions and maintain highest standards of fiscal responsibility (Priority: High; Due Dates: 3/31/2009).



**2009**

**Services & Advocacy for GLBT Elders (SAGE)**

**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1978	NYC & National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$4,049,750	30
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Improve the overall quality of life for LGBT older adults; support and advocate for the rights of LGBT older people; foster a greater understanding of aging in all communities; and promote positive images of LGBT life in the later years.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Transform national landscape on LGBT aging by providing strong leadership for an effective national advocacy agenda. SAGE will ensure a powerful, organized advocacy voice for LGBT older adults and that national aging research and policymaking address LGBT concerns. Create a national LGBT aging network that strengthens advocacy efforts.
2. Provide consistent leadership to move aging issues from periphery to center stage in the LGBT community, thus ending the invisibility of aging and older adults. Rather than exclusively occupying the field, SAGE will substantially expand the LGBT aging field by moving aging onto the agenda of LGBT organizations, LGBT opinion leaders, and key LGBT stakeholders.
3. Introduce new generation of service programs that effectively reaches and serves LGBT older adults in much greater numbers. SAGE will innovatively address the changing needs of post-Stonewall older adults and support nationwide replication of successful programs via technical assistance and dissemination of our learning.
4. Empower LGBT older adults with information they need to make important life decisions and help them become a well-informed constituency that can and does advocate on their own behalf.

One-year Key Planned Accomplishments for FY2010

1. Establish SAGE's multi-component caregiver program, which will provide education, assistance, support, and aging planning to growing numbers of LGBT caregivers and those caring for LGBT older adults.
2. Launch SAGEWorks, an employment readiness program to address the needs of growing numbers of LGBT older adults who are remaining in the workforce, as well as retirees who want or need to go back to work. SAGEWorks will include computer skills training, an online job board and partnerships with employers interested in reaching our constituents.
3. Capitalize on current opportunities to change federal policy and increase funding for aging programs that take LGBT older adults' needs and concerns into account. SAGE will undertake these efforts through its new membership in the national Leadership Council of Aging Organizations, its strong partnership with the National Gay & Lesbian Task Force, and its growing relationships with AARP and organizations such as the National Hispanic Council on Aging and the National Center & Caucus on Black Aged.
4. Deepen mainstream, non-profit and governmental aging organizations' engagement on LGBT aging issues. SAGE will deepen current partnerships and establish new relationships with mainstream organizations that can influence national, state and local public policy to the benefit of LGBT older adults.
5. Provide technical assistance and support to SAGE affiliates across the US via annual gatherings of SAGENet (the SAGE affiliate network), trainings, capacity-building activities and 1-on-1 technical assistance. SAGE will broaden its national reach by strengthening each SAGE affiliate's ability to deliver quality programming and advocacy.

**2009**

**Services & Advocacy for GLBT Elders (SAGE)**

**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

Key Accomplishments in FY2009

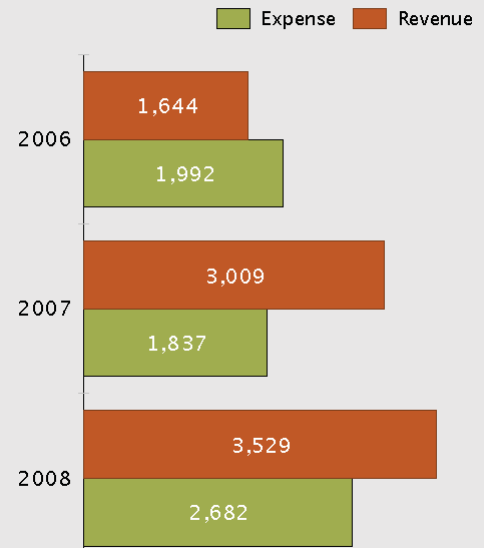
1. Hosted SAGE's 4th National Conference on LGBT Aging, with groundbreaking lead sponsorship by AARP. The conference presented 100+ seminars and sessions on various LGBT aging issues for about 600 mainstream and LGBT service providers and activists.
2. Launched *SAGE Is*, a widely acclaimed and highly successful public education campaign that increased awareness of LGBT aging and SAGE's relevance in the LGBT community. Ads on NYC buses and subways received widespread attention and won a prestigious mainstream advertising award.
3. Expanded and strengthened SAGENet, SAGE's network of affiliates located across the country. SAGENet now includes 5 affiliated SAGE locations across NY, as well as SAGE affiliates in Chicago, St. Louis, Salt Lake City, Philadelphia, Milwaukee, Denver, Norfolk (VA), Palm Springs, and south FL.
4. With partners, expanded SAGE's battle against the generational "digital divide" by providing older-adult-centered computer training courses including basic computer skills, online identity protection and safe Web browsing. Launched online education activities for LGBT older adults across the country, including SAGE's *Ask the Expert* interactive forum.
5. Secured seed funding from The Harry and Janette Weinberg Foundation to launch SAGE's innovative new caregiver support program.
6. Became the 1st LGBT member of the national Leadership Council of Aging Organizations.
7. Took over leadership of the national LGBT Aging Roundtable, in partnership with the National Gay and Lesbian Task Force.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

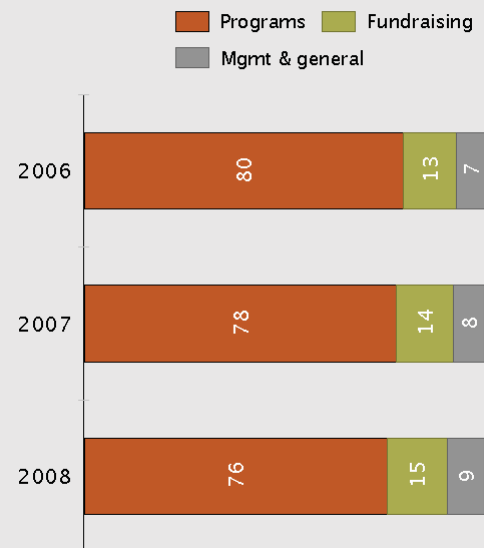
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.9	3.4	2.6
Days of working capital	57	297	285
Working capital (\$000)	\$310	\$1,481	\$2,048
Average daily cash expense (\$000)	\$5.4	\$5.0	\$7.2
Fundraising expense (cash only) to raise \$1	\$0.16	\$0.09	\$0.11
Total revenue raised through development efforts (\$000)	\$1,589	\$2,884	\$3,489
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	1,428	1,547	1,636
Number of individual donors who gave > \$1,000	44	54	68
Donor turnover (gave > \$35 in prior FY & not this FY)	48%	45%	47%
Number of individuals attending fundraising events (paid > \$100 per person)	315	360	374
Percent of total revenue from top 10 contributors	27%	37%	26%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 22,979	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$444,777	\$455,293	\$682,400
Net cash provided (used) by operating activities	-58,895	736,403	852,488
Net cash provided (used) by investing activities	-6,634	-483,844	-582,772
Net cash provided (used) by financing activities	76,045	-25,452	95,432
Net increase (decrease) in cash	\$10,516	\$227,107	\$365,148
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$455,293</u>	<u>\$682,400</u>	<u>\$1,047,548</u>

# 2009 Services & Advocacy for GLBT Elders (SAGE)

## Standard Annual Report

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

### Statement of Financial Position

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
<b>Assets</b>			
Cash and cash equivalents	\$455,293	\$682,400	\$1,047,548
Investments	0	471,717	517,135
Other current assets	346,953	665,302	1,079,876
Net fixed assets	60,382	55,199	452,766
Other long-term assets	0	0	0
<b>Total Assets</b>	<b>\$862,628</b>	<b>\$1,874,618</b>	<b>\$3,097,325</b>
<b>Liabilities</b>			
Current liabilities	\$492,247	\$338,824	\$597,012
Long-term debt	0	0	125,000
Other long-term liabilities	24,917	18,535	11,485
<b>Total Liabilities</b>	<b>\$517,164</b>	<b>\$357,359</b>	<b>\$733,497</b>
<b>Net Assets</b>			
Unrestricted	-112,022	722,760	1,201,942
Temporarily restricted	457,486	794,499	1,161,886
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$862,628</b>	<b>\$1,874,618</b>	<b>\$3,097,325</b>

### Statement of Activities

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$188,196	11%	\$259,228	9%	\$382,375	11%
Bequests	18,669	1%	748,840	25%	301,666	9%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	448,167	27%	729,151	24%	1,508,600	43%
Corporate contributions/Non-event sponsorships	250	0%	0	0%	100,829	3%
Government funding	723,263	44%	873,509	29%	943,636	27%
Program income	31,305	2%	33,631	1%	77,376	2%
Fundraising event income	332,438	20%	421,435	14%	413,288	12%
Less costs of direct benefit to donors	-122,112	-7%	-147,866	-5%	-161,340	-5%
Net fundraising event income	\$210,326		\$273,569		\$251,948	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	83,157	3%	-36,676	-1%
Other revenue	23,744	1%	7,753	0%	-1,053	-0%
<b>Total Revenue</b>	<b>\$1,643,920</b>		<b>\$3,008,838</b>		<b>\$3,528,701</b>	
<b>Expenses</b>						
Program services	1,574,884	79%	1,417,008	77%	1,984,425	74%
Fundraising	261,535	13%	257,035	14%	389,628	15%
Management and general	142,870	7%	145,690	8%	249,343	9%
Total cash expenses	\$1,979,289		\$1,819,733		\$2,623,396	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	12,777	1%	17,310	1%	58,736	2%
Total non-cash expenses	\$12,777		\$17,310		\$58,736	
<b>Total Expenses</b>	<b>\$1,992,066</b>		<b>\$1,837,043</b>		<b>\$2,682,132</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$348,146</b>		<b>\$1,171,795</b>		<b>\$846,569</b>	

2009

**Services & Advocacy for GLBT Elders (SAGE)**

**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
13	69%	31%	0%	Give-get of \$10,000 of which \$4,000 is a minimum personal contribution	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
23%	0%	77%	0%	0%	0%

Services & Advocacy for GLBT Elders (SAGE)  
305 Seventh Ave., 6th Floor  
New York, NY 10001  
212-741-2247  
www.sageusa.org

Additional Locations

None

Legal Names

Senior Action In A Gay Environment (SAGE) dba Services and Advocacy for GLBT Elders - 501(c)(3)

Contact

Michael Adams  
Executive Director  
madams@sageusa.org

**Senior Management Profile**

	Lowest	Average	Highest
Tenure with the organization	0.3	2.8	4.6
Compensation	\$92,000	\$117,150	\$160,000

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
30	25	5	47%	53%	0%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
13%	7%	70%	10%	0%	0%

Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- SAGE's New Approach** - For three decades, SAGE has been distinguished as the country's (and world's) oldest and largest agency serving and advocating for LGBT older adults. Since last year, SAGE's approach to the needs of LGBT older adults has been characterized by a particularly powerful two-pronged approach: renewed innovation and attention to service programming in NYC, coupled with the strengthening of SAGE's consumer education, advocacy and capacity-building efforts on a national scale.
- Revenue versus Expenses** - By the end of FY2007, SAGE had taken the steps necessary to recover from several financial challenges in FY2006. The organization brought its expenses into line with its expected financial support and paid down its debt from prior fiscal years. An unexpected large bequest received in FY2007 as well as improvements in SAGE's fundraising and fiscal management placed SAGE in a strong financial position as it entered FY2008.  
  
SAGE's financial statements show that the organization ended FY2008 with a surplus of nearly \$847,000. Of this increase, about \$346,000 (or over 40%) resulted from multi-year foundation grants secured by SAGE. These funds were specifically earmarked for SAGE's programs in FY2009 and could not be used for expenses in FY2008.  
An additional \$300,000 (or just over 35% of the surplus) resulted from bequests which were not spent but directed into SAGE's cash reserve fund. To strengthen the organization's ability to weather future financial difficulties, the Board of Directors of SAGE passed a prudent cash reserve policy in FY2007. The policy requires that, until the organization's cash reserve reaches designated levels or unless the Board directs otherwise, unused bequest proceeds be directed into a cash reserve fund.
- Capital Expenditures** - SAGE's transition to a new headquarters resulted in significant capital expenditures for leasehold improvements, renovations, and equipment. Per standard accounting procedures, these expenditures appear as increases in SAGE's assets on the Statement of Financial Position (Balance Sheet) instead of as expenses on the Statement of Activities (Income Statement), even though almost all of the purchases were paid for out-of-pocket. A portion of these capital expenditures will be expensed over the assets' useful lives by recording depreciation expense on the Statement of Activities.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

4. **Expense Percentage** - FY2008 saw a significant expansion of investment in SAGE's programs. In FY2007, SAGE spent just over \$1.4 million in program services for LGBT older adults. By June 30, 2008 (the end of FY2008), SAGE had spent close to \$2 million on its programs, over a 42% increase from the prior fiscal year. This increase in program spending provided SAGE with the capacity to meet the growing demand for its services and to expand the range of programs and advocacy it can offer to its constituents.
5. **Ratios of Financial Health** - Because of the Board's prudent financial steps, SAGE continued to maintain an appropriate liquidity ratio and # of days of working capital in FY2008, especially given SAGE's funding mix and reliance on government support (about 27% of total funding in FY2008). Since government partners require SAGE to "front" expenditures before reimbursement (which can often take several months), maintaining an appropriate level of available liquidity ensures that SAGE can continue its normal program delivery without fear of a cash flow issues.
6. **Indicators of Contributor Base** - SAGE saw a significant increase in its individual contributor base in FY2008 - both in terms of # of donors as well as dollars raised. SAGE's annual support from individual contributions grew from \$259,228 in FY2007 to \$382,375 in FY2008, an impressive 47.5% increase. This does not include dollars raised from individuals at fundraising events, which are an important part of SAGE's funding mix. Overall fundraising increased from \$2.9 million in FY2007 to \$3.5 million in FY2008, a 20% year-on-year increase and over a 118% increase compared to FY2006. SAGE was able to accomplish this growth while keeping fundraising costs to only \$0.11 per \$1 raised, a 31% decrease when compared to fundraising costs in FY2006. SAGE achieved this by broadening its reach to supporters across the country and by leveraging SAGE's enhanced visibility on the national stage.

**2009**

**Soulforce**  
**Standard Annual Report**

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**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1998	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$850,000	10
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

End religion-based discrimination against the LGBTQ community through relentless, nonviolent direct action.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

1. Create and widely distribute 5 new resources and update 8 published resources (e.g., books, pamphlets, DVDs) to educate the US about harmful effects of religion-based oppression of LGBTQ people.
2. Visit 100 of the 200+ higher-education institutions with policies that ban or expel LGBTQ students. While there, present case against religious-based oppression and help create Queer-Straight alliances and/or "Safe Zones" in 10+ schools.
3. Train 10,000+ new LGBTQ volunteers/activists and allies to use principles of nonviolence taught by M. K. Gandhi and M. L. King, Jr., to end political and religious oppression of LGBTQ people. Track and facilitate their activism through the creation of 10+ new Soulforce chapters throughout US.
4. Develop working partnerships with 40 LGBTQ and allied organizations to increase the effectiveness of diverse elements in the LGBTQ movement.
5. Educate people about dangers of fundamentalism and provide accurate information about LGBTQ people and their families by conducting media, advertising, conference, and other work in 125 cities across the US.

One-year Key Planned Accomplishments for FY2009

1. In coalition, launch [www.nonviolence4equality.org](http://www.nonviolence4equality.org), an online resource for people interested in nonviolent direct action, particularly for marriage equality.
2. Protest the Vatican, expose bigoted comments by the Catholic Church and push the Catholic Church to support the UN declaration to decriminalize homosexuality worldwide.
3. Launch Sundays of Solidarity (S.O.S), a delegation of 60+ Texans who believe in freedom, will attend John Hagee's Cornerstone Church in San Antonio; Soulforce's Executive Director will act as Cornerstone's liaison to the LGBTQ community.
4. Conduct Q Camp training to provide young adults with human and financial resources and education about equality and tools for nonviolent direct action in their local communities.
5. Begin preparations for 2010 Equality Ride.
6. Launch 2nd Right to Marry AZ Campaign with student organizations to organize a 97-mile walk through greater Phoenix for marriage equality.
7. Facilitate Anti-Heterosexism Conference, which educates people concerned about the health risks associated with efforts to change a person's sexual orientation or gender identity/expression.
8. Continue outreach initiative to LGBTQ People of Color.

Key Accomplishments in FY2008

1. Diversified board, gave it more accountability for fundraising, and introduced Executive Director's Round Table of advisors and long-term supporters of Soulforce.
2. Reached 52 communities around the world to conduct direct actions related to the equality movement.

**2009**

**Soulforce**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

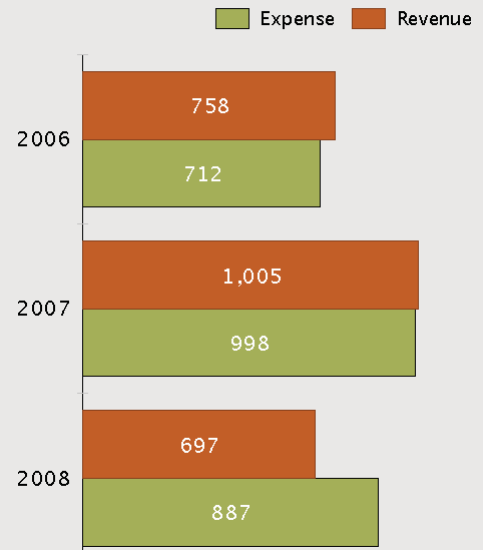
3. Protested 2008 United Methodist Conference and formed task force to further dialogue.
4. Walked across Arizona and upstate New York for marriage equality.
5. Facilitated American Family Outing in which diverse family delegation visited 6 mega-churches (3 black mega-churches) across the US.
6. Facilitated 3rd Equality Ride in which 18 young adults traveled by bus to 15 non-accepting, mostly Christian colleges (3 historically black colleges/universities) and challenged students there to examine anti-gay enrollment policies and climate. Several students came out as a result of Equality Ride's visit; 8 new gay-straight alliance groups and 1 safe zone formed; and 18 young activists gained and used skills to become leaders in their communities.
7. Reached several new communities in Eastern Europe, translated film *For the Bible Tells Me So* into Russian and screened it in St. Petersburg, Russia.
8. Protested and held vigils with straight allies in 13 communities across the US in 7 Straight Nights for Equal Rights.
9. Exposed religion-based discrimination through more than 250 media outlets.
10. Partnered with like-minded organizations for every major direct action.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

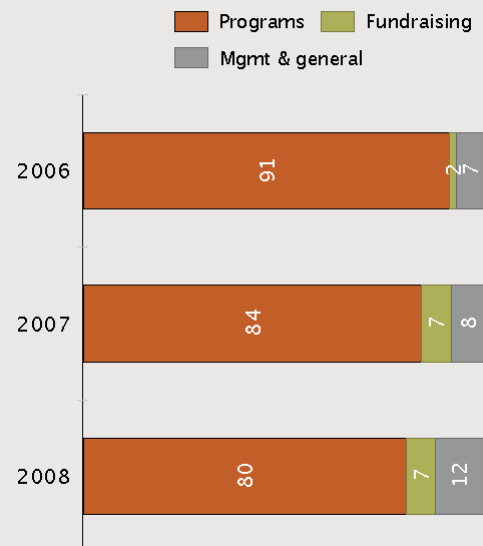
**Indicators of Financial Health & Efficiency**

**For the fiscal year ending December 31**

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	44.6	18.5	3.1
Days of working capital	127	95	29
Working capital (\$000)	\$246	\$258	\$69
Average daily cash expense (\$000)	\$1.9	\$2.7	\$2.4
Fundraising expense (cash only) to raise \$1	\$0.02	\$0.07	\$0.10
Total revenue raised through development efforts (\$000)	\$757	\$1,000	\$689

Indicators of Contributor Base

Number of individual donors who gave > \$35	1,887	2,220	3,000
Number of individual donors who gave > \$1,000	253	311	372
Donor turnover (gave > \$35 in prior FY & not this FY)	39%	53%	45%
Number of individuals attending fundraising events (paid > \$100 per person)	0	0	0
Percent of total revenue from top 10 contributors	39%	41%	36%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 17,000	

**Statement of Cash Flows**

	<u>Audited</u> <u>2006</u>	<u>Audited</u> <u>2007</u>	<u>Unaudited</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$128,102	\$167,318	\$229,056
Net cash provided (used) by operating activities	27,574	74,499	-156,533
Net cash provided (used) by investing activities	11,642	-12,761	1,617
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$39,216	\$61,738	-\$154,916
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$167,318</u>	<u>\$229,056</u>	<u>\$74,140</u>

**2009**

**Soulforce  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Unaudited</i> <u>2008</u>
<i>Assets</i>					
Cash and cash equivalents	\$167,318		\$229,056		\$74,140
Investments	1,723		14,251		8,856
Other current assets	80,796		27,383		13,021
Net fixed assets	8,138		4,025		2,408
Other long-term assets	0		0		0
<b>Total Assets</b>	<b>\$257,975</b>		<b>\$274,715</b>		<b>\$98,425</b>
<i>Liabilities</i>					
Current liabilities	\$3,793		\$13,135		\$26,872
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$3,793</b>		<b>\$13,135</b>		<b>\$26,872</b>
<i>Net Assets</i>					
Unrestricted	179,182		136,505		71,553
Temporarily restricted	75,000		125,075		0
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$257,975</b>		<b>\$274,715</b>		<b>\$98,425</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Unaudited</i> <u>2008</u>	
<i>Support &amp; Revenue</i>						
Individual contributions	\$522,943	69%	\$400,650	40%	\$483,181	69%
Bequests	0	0%	0	0%	1,165	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	213,967	28%	587,690	58%	186,798	27%
Corporate contributions/Non-event sponsorships	20,250	3%	10,225	1%	6,435	1%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	0	0%	0	0%	0	0%
Less costs of direct benefit to donors	0	0%	0	0%	0	0%
Net fundraising event income	\$0		\$0		\$0	
Merchandise sales (net of cost of goods sold)	2,641	0%	1,764	0%	11,845	2%
Investment income	-1,918	-0%	120	0%	2,227	0%
Other revenue	0	0%	4,540	0%	5,192	1%
<b>Total Revenue</b>	<b>\$757,883</b>		<b>\$1,004,989</b>		<b>\$696,843</b>	
<i>Expenses</i>						
Program services	645,389	91%	839,013	84%	711,947	80%
Fundraising	12,232	2%	72,689	7%	66,338	7%
Management and general	48,928	7%	81,776	8%	106,230	12%
Total cash expenses	\$706,549		\$993,478		\$884,515	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	5,610	1%	4,113	0%	2,355	0%
Total non-cash expenses	\$5,610		\$4,113		\$2,355	
<b>Total Expenses</b>	<b>\$712,159</b>		<b>\$997,591</b>		<b>\$886,870</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$45,724</b>		<b>\$7,398</b>		<b>-\$190,027</b>	

**2009**

**Soulforce**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

<b>Board Members</b>						<b>Locations &amp; Contact</b>
<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>		Soulforce PO Box 3195 Lynchburg, VA 24503 512-419-0600 www.soulforce.org
8	62%	38%	12%	\$2,500 give or get		
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
0%	0%	100%	0%	0%	0%	<u>Legal Names</u>  Soulforce, Inc. - 501(c)(3)
<b>Senior Management Profile</b>						<u>Contact</u>
			<u>Lowest</u>	<u>Average</u>	<u>Highest</u>	Jeff Lutes Executive Director jeff@soulforce.org
Tenure with the organization			1.0	5.8	11.0	
Compensation			\$40,000	\$50,000	\$60,000	
<b>Paid Staff</b>						
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	
10	6	4	60%	40%	10%	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>	
10%	0%	70%	20%	0%	0%	
<p><i>Note: Board and staff data as of 8/27/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>						

**Organization's Notes and Advisories**

2008 marked the end of our first decade - and it was a remarkable year. Amazing volunteers made it possible to nonviolently challenge and expose religion-based prejudice in a myriad of new and creative ways.

Soulforce compelled Rick Warren and Joel Osteen to look LGBT couples in the eye and shake the hands of their children. We engaged four more of America's most influential religious leaders (including those from three of the country's largest Black churches) in heartfelt conversations about faith, family, and LGBTQ people. We stood vigil outside the United Methodist Church General Conference and took action when the church failed, once again, to do right by its LGBTQ members. For the second year in a row, we empowered straight allies to speak out about equality with public events held in over 60 cities since 2007. These events garnered significant media coverage to help get our message into the mainstream.

Soulforce Q spoke to hundreds of people about marriage equality in both NY and AZ. They built essential networks with young activists in Italy, Austria, Belgium, and Germany; and even brought a translated version of *For The Bible Tells Me So* to St. Petersburg, Russia - where the film was shown in undisclosed locations because of efforts by authorities to shut it down. The Equality Ride visited fifteen more schools, including some historically black colleges and universities, and young riders have now had change-producing conversations with thousands of students at over 70 institutions of higher learning since the project launched in late 2005.

Like the rest of the country, we experienced economic challenges in the second half of 2008 which forced us to finish the year slightly in the red. To brace for 2009, we trimmed staff salaries and reduced other major expenses. Nonetheless, we are more committed to our mission than ever before, and we look onward with determination and confidence.

For additional information please contact Soulforce or visit our website at [www.soulforce.org](http://www.soulforce.org).



**2009**

**Sylvia Rivera Law Project (SRLP)**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2002	New York & National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Legal
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$489,860	7
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Work to guarantee that all people are free to self-determine their gender identity and expression, regardless of income or race, and without harassment, discrimination, or violence. SRLP is a collective organization founded on the understanding that gender self-determination is inextricably intertwined with racial, social and economic justice. We seek to increase the political voice and visibility of people of color (POC) and low-income people who are transgender, intersex, or gender non-conforming.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Address urgent unmet legal needs of 250+ POC and low-income people who are transgender, intersex or gender non-conforming each year.
2. Change institutional policies and practices to improve conditions for transgender, intersex and gender non-conforming people in detention and foster care; reduce police violence and harassment; improve access to identity documents, healthcare and public benefits; and reduce discrimination and harassment in employment, education, housing, and public accommodations. Do this by engaging in litigation and/or policy negotiations while consistently working to subvert inherently oppressive systems.
3. Develop community members' skills, leadership, and political power through Know Your Rights trainings and brochures, skill-based trainings, and connecting 25+ clients each year to organizing opportunities.
4. Internally, increase the participation, decision-making and leadership of community members who are most impacted by SRLP's work. Do this through ongoing Community Internships, creation of a formal leadership development program, expansion of our Prisoner Advisory Committee, and our evolving membership structure.
5. Improve and maintain infrastructure and capacity needed to sustain our work without hierarchy. Do this by increasing the percentage of support received from grassroots fundraising income, improvement of staff horizontal supervision structure, and moving to a larger office.

One-year Key Planned Accomplishments for FY2010

1. Provide free, quality, respectful, and affirming legal services to 250+ POC and low-income people who are transgender, intersex, or gender non-conforming, particularly in areas of Medicaid coverage, immigration, prisoners' rights, discrimination, public benefits, and, identity-document changes.
2. Develop skills, leadership and political power of community members while providing support to related community organizing projects by connecting 25 clients to direct organizing opportunities; legally supporting 3+ direct actions; training 50 community members in "Know Your Rights" and 10+ in public speaking, organizing, legal advocacy and fundraising via internships or skill-shares.

**2009**

**Sylvia Rivera Law Project (SRLP)**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

3. In collaboration with community members/allied organizations, gain repeal of NY regulation barring Medicaid coverage of gender-related health care and ensure healthcare coverage for transgender youth in NYC foster care; file and litigate case challenging NY Department of Correctional Services' policy of denying transgender health care; push for NYPD Policy to prohibit abusive strip searches of trans and gender-nonconforming people; and push for National Commission on Correctional Healthcare position statement on transgender healthcare in correctional settings.
4. Educate 200+ people and train 100+ service providers in our community's needs (including accessible public services and reduced discrimination and violence) through publications, workshops and presentations.
5. Increase organizational infrastructure by strengthening horizontal supervision structure; increasing organizational access points; and moving to new office that better accommodates staff growth and member participation.

Key Accomplishments in FY2009

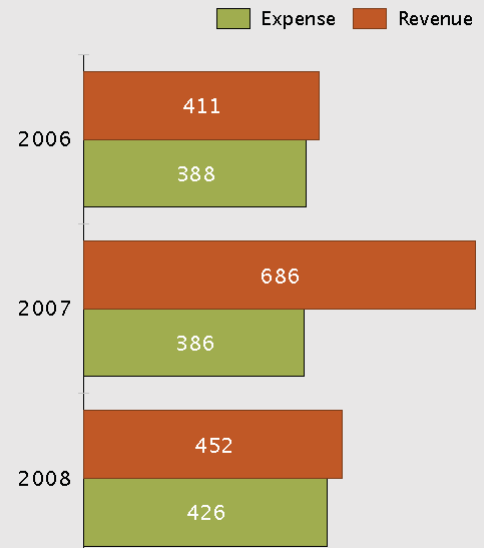
1. Provided free, quality, respectful, and affirming legal services to 305 people; established off-site monthly legal clinics at Bronx Community Pride Center; and won impact litigation case upholding transgender people's right to name change without requirement to submit arbitrary and irrelevant medical evidence
2. Developed community members' skills, leadership and political power by referring 24 new clients to campaigns for transgender jobs and education, immigrant rights and anti-police brutality; matching 50+ incarcerated clients with pen pals; providing 5 "Know Your Rights" trainings and 8 skill shares; drafting 2 new "Know Your Rights" publications; and providing legal support at 4 direct actions by allied organizations.
3. In collaboration with community members and allied organizations, negotiated with 4 government agencies with direct responsibility for foster care, criminal justice, healthcare, and identity documents; won policies prohibiting discrimination on the basis of sexual orientation and gender identity/expression in NY juvenile justice facilities and NYC foster care; caused the NYC Board of Corrections to add transgender people to their non-discrimination statement; and began negotiations to repeal the NY Medicaid regulation barring coverage of transgender-related health care.
4. Presented at 8 regional or national conferences and trained 150+ service providers, including training trans and gender non-conforming youth medical service providers at The Health and Education Alternatives for Teens Program at SUNY Downstate Medical School and training staff of the Brooklyn Criminal Court (including judges, court officers, clerks, defenders and district attorneys) on issues specific to transgender defendants.
5. Launched new website and constituent relationship management database; completed 5-year strategic plan; and engaged consultant on our horizontal staff supervision structure.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

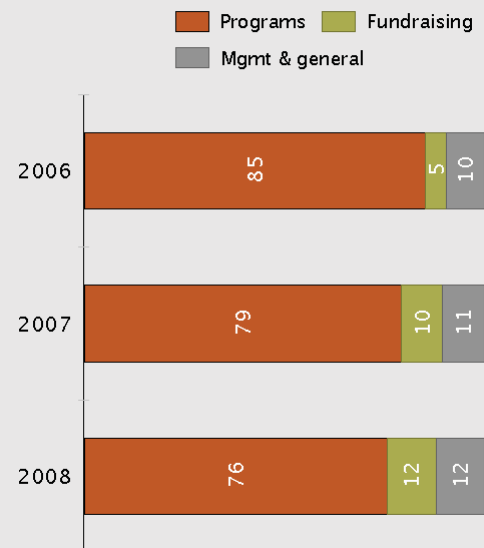
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	5.2	19.8	17.1
Days of working capital	169	459	391
Working capital (\$000)	\$179	\$481	\$446
Average daily cash expense (\$000)	\$1.1	\$1.0	\$1.1
Fundraising expense (cash only) to raise \$1	\$0.05	\$0.06	\$0.11
Total revenue raised through development efforts (\$000)	\$396	\$664	\$424
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	203	215	305
Number of individual donors who gave > \$1,000	7	8	7
Donor turnover (gave > \$35 in prior FY & not this FY)	45%	46%	45%
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	N/A	N/A
Percent of total revenue from top 10 contributors	87%	51%	78%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 3,425	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited</u> 2006	<u>Audited</u> 2007	<u>Audited</u> 2008
Cash and cash equivalent balance at beginning of year	\$108,473	\$210,657	\$253,949
Net cash provided (used) by operating activities	181,278	46,550	82,261
Net cash provided (used) by investing activities	-79,094	-3,258	-8,155
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$102,184	\$43,292	\$74,106
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$210,657</u>	<u>\$253,949</u>	<u>\$328,055</u>

**2009**

**Sylvia Rivera Law Project (SRLP)**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008
<b>Assets</b>					
Cash and cash equivalents	\$210,657		\$253,949		\$328,055
Investments	0		0		0
Other current assets	8,892		239,859		137,543
Net fixed assets	4,622		2,323		5,273
Other long-term assets	2,400		2,400		60,400
<b>Total Assets</b>	<b>\$226,571</b>		<b>\$498,531</b>		<b>\$531,271</b>
<b>Liabilities</b>					
Current liabilities	\$40,569		\$12,850		\$19,202
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$40,569</b>		<b>\$12,850</b>		<b>\$19,202</b>
<b>Net Assets</b>					
Unrestricted	144,220		225,681		286,069
Temporarily restricted	41,782		260,000		226,000
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$226,571</b>		<b>\$498,531</b>		<b>\$531,271</b>

**Statement of Activities**

	<i>Audited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$29,757	7%	\$44,435	6%	\$51,276	11%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	2,917	1%	1,353	0%	7,350	2%
Foundation contributions	335,980	82%	590,283	86%	321,200	71%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	11,293	3%	7,773	1%	11,888	3%
Fundraising event income	30,645	7%	28,171	4%	49,345	11%
Less costs of direct benefit to donors	-444	-0%	-519	-0%	-4,723	-1%
Net fundraising event income	\$30,201		\$27,652		\$44,622	
Merchandise sales (net of cost of goods sold)	0	0%	4,635	1%	5,628	1%
Investment income	0	0%	0	0%	0	0%
Other revenue	1,285	0%	9,465	1%	10,495	2%
<b>Total Revenue</b>	<b>\$411,433</b>		<b>\$685,596</b>		<b>\$452,459</b>	
<b>Expenses</b>						
Program services	329,082	85%	303,739	79%	319,394	75%
Fundraising	19,884	5%	38,180	10%	46,161	11%
Management and general	37,525	10%	40,346	10%	50,820	12%
Total cash expenses	\$386,491		\$382,265		\$416,375	
Non-cash expenses						
In-kind	0	0%	1,353	0%	7,350	2%
Depreciation	1,996	1%	2,299	1%	2,346	1%
Total non-cash expenses	\$1,996		\$3,652		\$9,696	
<b>Total Expenses</b>	<b>\$388,487</b>		<b>\$385,917</b>		<b>\$426,071</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$22,946</b>		<b>\$299,679</b>		<b>\$26,388</b>	

2009

**Sylvia Rivera Law Project (SRLP)**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
5	40%	40%	80%	Each Board and Collective Member must fill out an annual pledge form listing personal gifts and fundraising activities (donor solicitations, in-kind donations, etc.).	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
40%	0%	40%	20%	0%	0%

**Locations & Contact**

Sylvia Rivera Law Project (SRLP)  
 322 8th Ave., 3rd Floor  
 New York, NY 10001  
 212-337-8550  
 www.srlp.org

Additional Locations

None

Legal Names

Sylvia Rivera Law Project, Inc. - 501(c)(3)

Contact

Daniel McGee  
 Development Coordinator  
 daniel@srlp.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.1	2.8	4.8
Compensation	N/A	\$46,301	N/A

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
7	3	4	29%	43%	86%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
14%	29%	43%	14%	0%	0%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Senior Management Compensation** - SRLP uses a non-hierarchical collective structure that models our vision of a more just society. All staff, as well as all volunteer collective members, share equal decision-making power through structured processes. In order to avoid traditional hierarchies based on class, race and educational privilege, all staff members are paid the same base salary (pro-rated for part-time staff).
- Liquidity and Working Capital**
  - Grants and contributions are recognized when the grant or contribution has been awarded. A significant portion of SRLP's Other Current Assets are receivables from foundation grants awarded for future years.
  - SRLP's cash-on-hand is targeted for strategic growth in both program and long-term organizational capacity and sustainability. In addition to increasing program staff hours, we are building an organizational infrastructure to accommodate this and future growth.
- Emergency Reserves** - The SRLP Board and collective has designated \$144,000 of Unrestricted Net Assets for operating cash reserves to ensure the organization's stability through any unforeseen disaster or major recession.



**2009**

**The Task Force  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1973	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Advocacy
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$10,769,000	45
<i>Tax Status*</i>	
501(c)(3)	91%
501(c)(4)	9%

\* Percent of latest FY revenue.

**Mission**

Build the LGBT community's political power from the ground up by training activists; organizing broad-based campaigns to defeat anti-LGBT referenda and advance pro-LGBT legislation; and building the movement's organizational capacity. Via the Task Force Policy Institute, the movement's premier think tank, provide research and policy analysis to support the struggle for complete equality and to counter right-wing lies. We work within a broader social justice movement to create a nation that respects the diversity of human expression and identity and creates opportunity for all.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

The Task Force's current strategic plan goes through Dec 2009. The board is currently undertaking its next 3-year strategic planning process and anticipated accomplishments are listed below. Please call executive director Rea Carey (202-639-6302) with any questions about activities in addition to those listed for FY2010-2014 below.

1. Train 2,500+ emerging leaders via the Task Force's Academy for Leadership and Action.
2. Achieve 20 concrete non-legislative federal administration policy changes via New Beginning Initiative that will improve the lives of LGBT people.
3. Assist 10 LGBT statewide or local organizations to pass nondiscrimination or family recognition laws or to defend such laws from anti-LGBT referenda.

One-year Key Planned Accomplishments for FY2010

1. Continue implementation of Academy for Leadership and Action, offering rigorous trainings that build skills, leadership and diversity of staff, board members and volunteers of LGBT organizations. Academy includes entry, intermediate and advanced programs in fundraising, grassroots organizing, lobbying, messaging/media work, enhancing organizational capacity and aligning resources to achieve political goals and organizational development. Specifically in FY2010:
  - Create full electronic library of curriculum topic areas and process for updating training topics
  - Present 3rd Academy installment at Creating Change conference, incorporating lessons learned from 2009 Academy
  - Expand # of individuals who have completed 1+ Academy courses to 800+
2. Partner with CA organizations – Vote for Equality (VFE) and Equality California (EQCA) – to build an effective model of face-to-face voter persuasion about the freedom to marry. Currently, the movement has not yet developed messaging on marriage that has proven itself effective at shifting public opinion. The Task Force, VFE, and EQCA are organizing a series of door-to-door canvasses to test various messages' efficacy at persuading former Yes on 8 voters to support marriage equality.
3. Partner with 2+ LGBT statewide or local organizations to pass nondiscrimination or family recognition laws or to defend such laws from anti-LGBT referenda.
4. With United ENDA coalition, undertake strategic grassroots mobilization campaign in key US Congressional districts to advance a gender identity-inclusive ENDA.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

5. With Institute for Welcoming Resources' partner denominational programs, increase # of "welcoming and affirming" congregations (and potentially synagogues) by 5%, from 3,400 to 3,570.
6. Reissue *Outing Age*, the Policy Institute's groundbreaking report on LGBT aging issues, and disseminate it to federal and state lawmakers, other policymakers, at mainstream aging advocacy venues, and throughout LGBT movement.
7. Disseminate findings of Policy Institute's study on prevalence of discrimination against transgender people in the US - with 6,500 respondents, the largest sampling of transgender experience ever. Release issue briefs for the public, legislators and policymakers on e.g., economic security, education, health care access and utilization, barriers to public accommodation, family security and criminal justice.

Key Accomplishments in FY2009

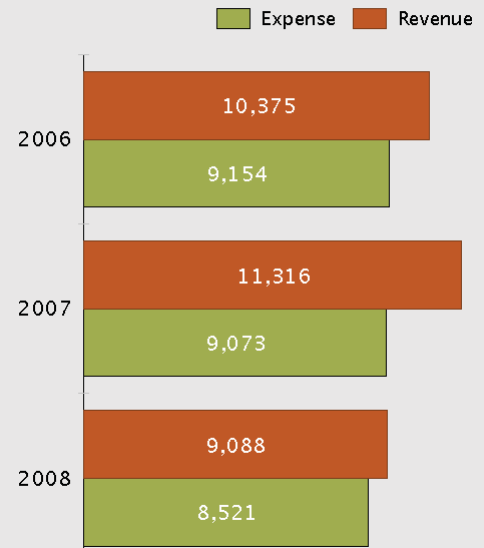
1. Trained 1,200+ state and local activists in Academy curricula including grassroots and faith-based organizing and fundraising; 80+ hours of Academy training to 650 and general conference programming to 2,000 individuals at the *National Conference on LGBT Equality: Creating Change*.
2. Deployed 11 staff members to fight CA's Proposition 8 and led largest volunteer voter contact operation ever mounted to fight an anti-LGBT initiative campaign: 90+ organizers (9+ have gone on to organizing positions in other LGBT campaigns), 49,500+ volunteer list (11,000+ volunteered on Election Day), 135,000+ identified no votes (highest # of voter IDs ever from LGBT volunteer phone-banking), and \$1.5 million+ in grassroots contributions. Also served on No on 8 Executive Committee; ran field campaign that helped increase pro-LGBT vote from 38% on 2000 amendment to 48% in 2008; and issued post-election reports on Prop 8 faith-based organizing and African American voting.
3. Helped local partners disqualify Montgomery County, MD ballot initiative to repeal new transgender nondiscrimination law. Meanwhile built campaign infrastructure to defeat referendum, which Basic Rights Montgomery used to create 4-FTE field/fundraising operation.
4. Helped local partners defeat Mar 2009 referendum to repeal Gainesville, FL non-discrimination ordinance by 58% to 42% margin. Led student voter ID and GOTV program that delivered critical votes.
5. Following 5 years of ongoing training and financial support to EqualityMaine, partnered with them to pass state law enabling same-sex couples to marry. Provided intensive training and mentorship to field leadership, including Power Summit field organizing/fundraising training.
6. Co-led (with NCTE) United ENDA's 360-member coalition, which got gender identity-inclusive Employment Non-Discrimination Act (ENDA) into 2008 Democratic Platform and introduced in US House, followed by high-visibility Congressional hearings. Strategized with Rep. Barney Frank and staff of Rep. Tammy Baldwin on fully-inclusive ENDA and submitted testimony for Congressional Record.
7. Increased # of welcoming and affirming congregations in Institute for Welcoming Resources' network to 3,400 (+9% since 2008 and +150% since 2006 IWR-Task Force merger).
8. Completed National Survey on Transgender Discrimination documenting experiences of discrimination in housing, employment, public accommodation, education, family life and criminal justice systems, and which has already been used by lawmakers in introducing the gender identity-inclusive ENDA. A report is forthcoming.
9. Completed research for an update of the groundbreaking publication, *Outing Age*, which will be released in fall 2009.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

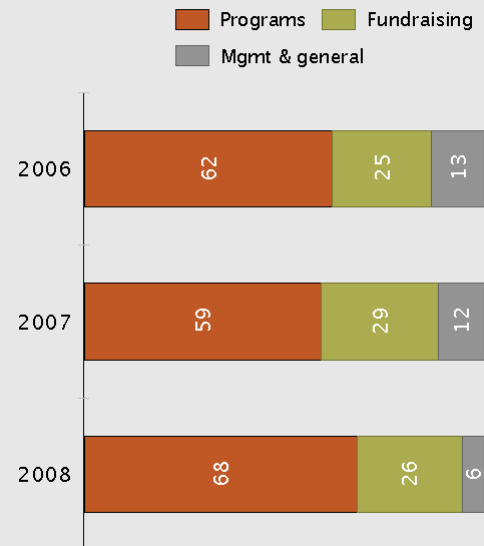
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	0.6	0.1	0.5
Days of working capital	40	52	25
Working capital (\$000)	\$986	\$1,265	\$576
Average daily cash expense (\$000)	\$24.7	\$24.4	\$22.9
Fundraising expense (cash only) to raise \$1	\$0.23	\$0.26	\$0.26
Total revenue raised through development efforts (\$000)	\$9,880	\$10,286	\$8,531
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	9,794	8,142	5,959
Number of individual donors who gave > \$1,000	294	243	188
Donor turnover (gave > \$35 in prior FY & not this FY)	49%	48%	50%
Number of individuals attending fundraising events (paid > \$100 per person)	4,845	5,788	6,003
Percent of total revenue from top 10 contributors	61%	75%	54%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 153,138	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$712,984	\$713,704	\$154,067
Net cash provided (used) by operating activities	-141,858	-134,148	405,950
Net cash provided (used) by investing activities	-230,104	-19,174	-24,818
Net cash provided (used) by financing activities	<u>372,682</u>	<u>-406,315</u>	<u>-115,340</u>
Net increase (decrease) in cash	\$720	-\$559,637	\$265,792
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$713,704</u>	<u>\$154,067</u>	<u>\$419,859</u>

**2009**

## The Task Force

### Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008
<b>Assets</b>					
Cash and cash equivalents	\$713,704		\$154,067		\$419,859
Investments	0		0		0
Other current assets	1,482,746		2,211,449		1,083,514
Net fixed assets	560,652		428,947		306,982
Other long-term assets	1,363,171		3,519,162		4,829,048
<b>Total Assets</b>	<b>\$4,120,273</b>		<b>\$6,313,625</b>		<b>\$6,639,403</b>
<b>Liabilities</b>					
Current liabilities	\$1,210,049		\$1,100,980		\$927,640
Long-term debt	99,591		65,597		9,315
Other long-term liabilities	0		94,195		82,542
<b>Total Liabilities</b>	<b>\$1,309,640</b>		<b>\$1,260,772</b>		<b>\$1,019,497</b>
<b>Net Assets</b>					
Unrestricted	-492,760		-847,857		-938,238
Temporarily restricted	3,303,393		5,900,710		6,558,144
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$4,120,273</b>		<b>\$6,313,625</b>		<b>\$6,639,403</b>

### Statement of Activities

	<u>Audited</u> 2006		<u>Audited</u> 2007		<u>Audited</u> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$3,970,370	38%	\$6,074,531	54%	\$4,156,347	46%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	10,892	0%	0	0%	0	0%
Foundation contributions	4,613,250	44%	3,462,319	31%	2,861,130	31%
Corporate contributions/Non-event sponsorships	75,000	1%	55,000	0%	50,000	1%
Government funding	0	0%	0	0%	0	0%
Program income	243,881	2%	203,054	2%	287,772	3%
Fundraising event income	1,471,287	14%	1,624,579	14%	1,636,210	18%
Less costs of direct benefit to donors	-249,905	-2%	-242,671	-2%	-173,169	-2%
Net fundraising event income	\$1,221,382		\$1,381,908		\$1,463,041	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	239,937	2%	138,755	1%	270,124	3%
<b>Total Revenue</b>	<b>\$10,374,712</b>		<b>\$11,315,567</b>		<b>\$9,088,414</b>	
<b>Expenses</b>						
Program services	5,568,095	61%	5,372,102	59%	5,804,588	68%
Fundraising	2,238,322	24%	2,644,622	29%	2,242,227	26%
Management and general	1,201,458	13%	905,744	10%	327,763	4%
Total cash expenses	\$9,007,875		\$8,922,468		\$8,374,578	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	146,017	2%	150,879	2%	146,783	2%
Total non-cash expenses	\$146,017		\$150,879		\$146,783	
<b>Total Expenses</b>	<b>\$9,153,892</b>		<b>\$9,073,347</b>		<b>\$8,521,361</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$1,220,820</b>		<b>\$2,242,220</b>		<b>\$567,053</b>	

**2009**

**The Task Force  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
31	61%	39%	10%	Each board member is expected to give/get \$10,000 per year, including a minimum personal gift of \$1,500.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
6%	6%	76%	6%	0%	6%

The Task Force  
1325 Massachusetts Ave., NW  
Suite 600  
Washington, DC 20005  
202-393-5177  
www.thetaskforce.org

Additional Locations

Cambridge  
Los Angeles  
Miami  
Minneapolis  
New York City

Legal Names

National Gay and Lesbian  
Task Force Foundation -  
501(c)(3)  
National Gay and Lesbian  
Task Force Action Fund -  
501(c)(4)

Contact

Rea Carey  
Executive Director  
rcarey@thetaskforce.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	0.8	4.5	9.5
Compensation	\$102,396	\$137,319	\$207,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
45	44	1	36%	64%	7%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
13%	5%	64%	13%	0%	5%

*Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

While the Task Force's fundraising percentage appears to be higher, historically, than many other sister organizations included in the MAP project, we believe that this has to do with the widely different methods of expense recording and allocation used by different organizations. We believe that the Task Force has been using a more conservative approach to the accounting than some LGBT participating organizations. The conclusion that we are spending a comparatively disproportionate amount of money to raise money or on management is likely erroneous.



2009

**Transgender Law Center**  
**Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2004	California & National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Legal
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$542,101	7
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Connect transgender people and their families to technically sound and culturally competent legal services, increase acceptance and enforcement of laws and policies that support CA's transgender communities, and work to change laws and systems that fail to incorporate the needs and experiences of transgender people. TLC utilizes direct legal services, public policy advocacy, and public education to advance the rights and safety of diverse transgender communities, including all of the innumerable genders and forms of gender expression that fall within and outside of stereotypical gender norms. TLC understands, acknowledges, and resists non-gender based oppressions that limit people's ability to live in peace.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2009-2013

- Access to non-discriminatory healthcare and insurance:** Enforce CA's Insurance Non-Discrimination Act and eliminate exclusions specifically affecting transgender people via direct legal services and policy advocacy; train 10 employers/employer associations to negotiate with health insurance providers for transgender employee coverage; mobilize advocates for 3-5 large public or private institutions to adopt transgender-inclusive insurance policies; increase access to community-based health services by training and mobilizing providers and patients; and advocate for public funding of transgender-inclusive health services at community clinics.
- Economic Development to reduce under- and unemployment:** Provide direct legal services and litigation to enforce employment laws and support transgender workers; mobilize transgender community members, LGBT and progressive organizations, and policymakers in CA to secure passage of fully-inclusive federal employment protections; and advocate for transgender economic development programs' replication.
- School safety for transgender and gender non-conforming youth:** Increase # of school districts fully implementing CA's gender identity nondiscrimination laws; and train 150 youth in Gay-Straight Alliances (GSAs) to advocate for implementation of protections for transgender/gender non-conforming youth in public schools.
- Community Legal Assistance:** Provide free legal services to low-income transgender and gender non-conforming Californians with a focus on combating discrimination in healthcare, employment, housing and public accommodations; work with social service providers (e.g., homeless shelters) to create and enforce policies to increase services to transgender people; provide attorney trainings, formalize TLC's network of cooperating attorneys, and create free legal clinics throughout CA in order to increase representation of low-income transgender clients; and conduct "Know Your Rights" trainings for transgender people and groups to advocate for themselves.
- Advance an inclusive movement for LGBT Equality:** Increase # of transgender activists advocating for LGBT civil rights through sustained, replicable leadership development and advocacy training; help movement organizations authentically address needs of transgender employees and community members via strengthened relationships between the LGB and T communities, strategic partnerships and technical assistance; and document successful TLC programs for potential replication in other areas.

One-year Key Planned Accomplishments for FY2009

- Increase implementation/enforcement of CA's anti-discrimination laws by providing counsel to 900 transgender individuals and their families and focused advocacy or direct representation to 100 community members (focus on potential to create systemic change in employment, healthcare, insurance/Medi-Cal access, schools, and gender-segregated services and institutions).

**2009**

**Transgender Law Center**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

2. Increase access to quality, culturally competent legal services for transgender clients in CA and US by conducting 8+ Continuing Legal Education (CLE) workshops, distributing a 6-hour distance-learning CLE, providing technical assistance (TA) to attorneys working with transgender clients and formalizing our network of cooperating attorneys.
3. Train and mobilize 200 transgender youth/adults to engage in community organizing and policy advocacy supporting LGBT civil rights.
4. Increase support for policies and programs to improve transgender adults' economic status by: releasing and disseminating The State of Transgender California covering workforce, health, and housing issues; maintaining statewide Transgender Economic Development Initiative Leadership Counsel to educate policymakers; and advocating for increased public investment in transgender-inclusive workforce development programs.
5. Build TLC's infrastructure by completing and launching implementation of 2009-2012 strategic plan; securing resources to develop brand/messaging strategy; and securing improved office space and telecommunications.

Key Accomplishments in FY2008

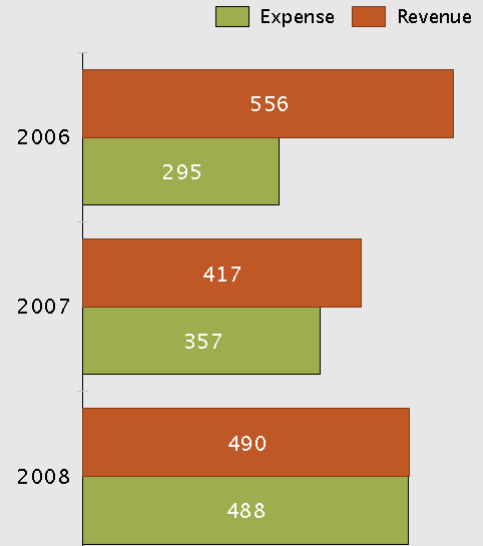
1. Provided free counsel to 990 and direct representation to 95 transgender/gender non-conforming Californians and their families on issues related to identity documents (roughly 35% of clients), health care (15%), employment (15%), family law (10%), immigration (10%), public accommodations (5%), student safety (3%), housing (3%), and hate crimes (3%). Secured decision to withhold deportation of Brazilian torture survivor and won MediCal appeal for transgender woman denied coverage.
2. Created 6-hour CLE distance-learning package and conducted 8 CLE trainings for 430 attorneys and law students in employment law, identity documents, best practices for law offices serving transgender clients, and school law. Provided TA to 100+ attorneys representing transgender/gender non-conforming clients. In partnership with Immigration Equality, published *Immigration Law and the Transgender Client* through the American Immigration Lawyers Association.
3. Trained 1300 community members, attorneys, healthcare professionals, law students, social service providers, and employers in 50 trainings on leadership, organizing and advocacy for transgender rights. Organized 4th Annual Transgender Leadership Summit where 300+ transgender and gender non-conforming people learned and shared strategies for community organizing and policy advocacy on federal employment protections, marriage equality, safe schools, gender-neutral bathrooms, health care access, and economic justice.
4. Trained and mobilized 75+ youth leaders from GSA Network to advocate for implementation of gender identity provisions in CA's safe schools laws.
5. Launched Project HEALTH (Harnessing Education, Advocacy and Leadership for Transgender Health) to mobilize healthcare providers and patients to advocate for improved access to transgender-inclusive healthcare.
6. Helped organize informational meeting of CA Senate Committee on Public Safety to examine issues affecting LGBT people in the prison system; secured pending legislation to implement policy recommendations.
7. Conducted 1st Transgender Economic Health Survey in which 646 working-age transgender Californians documented disparities in pay, employment rates, healthcare access, and housing. (Report summary released in early 2009.) Launched 7-person Transgender Leadership Council to educate policymakers about need for transgender workforce development programs and protections. Mobilized more than 25 community members to educate policymakers about the need for federal employment protections.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

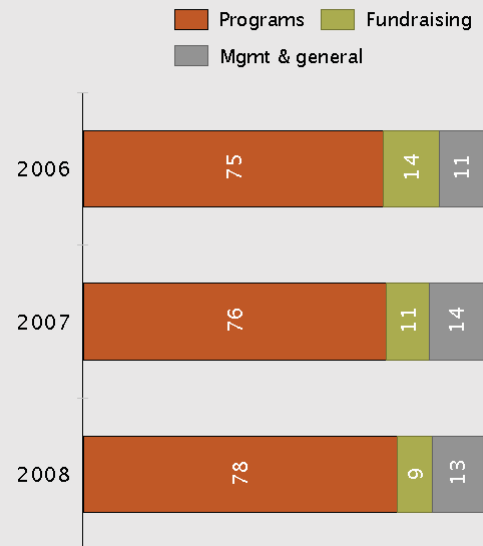
**Indicators of Financial Health & Efficiency**

For the fiscal year ending December 31

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



Ratios of Financial Health

	2006	2007	2008
Liquidity ratio	22.9	6.3	17.9
Days of working capital	474	417	332
Working capital (\$000)	\$382	\$407	\$444
Average daily cash expense (\$000)	\$0.8	\$1.0	\$1.3
Fundraising expense (cash only) to raise \$1	\$0.08	\$0.09	\$0.09
Total revenue raised through development efforts (\$000)	\$554	\$410	\$485

Indicators of Contributor Base

Number of individual donors who gave > \$35	143	178	198
Number of individual donors who gave > \$1,000	10	20	8
Donor turnover (gave > \$35 in prior FY & not this FY)	67%	80%	83%
Number of individuals attending fundraising events (paid > \$100 per person)	20	16	50
Percent of total revenue from top 10 contributors	84%	77%	91%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 3,148	

**Statement of Cash Flows**

	<u>Reviewed</u> <u>2006</u>	<u>Reviewed</u> <u>2007</u>	<u>Reviewed</u> <u>2008</u>
Cash and cash equivalent balance at beginning of year	\$76,708	\$232,704	\$336,607
Net cash provided (used) by operating activities	158,214	103,902	-57,466
Net cash provided (used) by investing activities	-2,218	0	0
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	\$155,996	\$103,902	-\$57,466
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$232,704</u>	<u>\$336,606</u>	<u>\$279,141</u>

2009

# Transgender Law Center

## Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Statement of Financial Position

<u>Assets</u>	<u>Reviewed</u> <u>2006</u>		<u>Reviewed</u> <u>2007</u>		<u>Reviewed</u> <u>2008</u>
Cash and cash equivalents	\$232,704		\$336,606		\$279,141
Investments	0		0		0
Other current assets	159,461		123,276		180,621
Net fixed assets	1,996		1,553		1,108
Other long-term assets	1,466		37,706		2,706
<b>Total Assets</b>	<b>\$395,627</b>		<b>\$499,141</b>		<b>\$463,576</b>
<u>Liabilities</u>					
Current liabilities	\$10,172		\$53,183		\$15,599
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
Total Liabilities	\$10,172		\$53,183		\$15,599
<u>Net Assets</u>					
Unrestricted	114,943		168,684		161,223
Temporarily restricted	270,512		277,274		286,754
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$395,627</b>		<b>\$499,141</b>		<b>\$463,576</b>

### Statement of Activities

<u>Support &amp; Revenue</u>	<u>Reviewed</u> <u>2006</u>		<u>Reviewed</u> <u>2007</u>		<u>Reviewed</u> <u>2008</u>	
Individual contributions	\$39,601	7%	\$28,811	7%	\$38,434	8%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	0	0%
Foundation contributions	490,674	88%	323,670	78%	337,652	69%
Corporate contributions/Non-event sponsorships	3,866	1%	11,991	3%	35,831	7%
Government funding	0	0%	19,928	5%	32,183	7%
Program income	15,535	3%	5,463	1%	0	0%
Fundraising event income	5,721	1%	22,882	5%	43,642	9%
Less costs of direct benefit to donors	-1,096	-0%	-2,995	-1%	-2,550	-1%
Net fundraising event income	\$4,625		\$19,887		\$41,092	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	1,573	0%	7,434	2%	4,936	1%
Total Revenue	<b>\$555,874</b>		<b>\$417,184</b>		<b>\$490,128</b>	
<u>Expenses</u>						
Program services	220,111	75%	269,441	76%	381,912	78%
Fundraising	41,796	14%	38,650	11%	43,186	9%
Management and general	32,425	11%	48,148	13%	62,568	13%
Total cash expenses	\$294,332		\$356,239		\$487,666	
Non-cash expenses						
In-kind	0	0%	0	0%	0	0%
Depreciation	222	0%	443	0%	444	0%
Total non-cash expenses	\$222		\$443		\$444	
Total Expenses	<b>\$294,554</b>		<b>\$356,682</b>		<b>\$488,110</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$261,320</b>		<b>\$60,502</b>		<b>\$2,018</b>	

**2009**

**Transgender Law Center  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
8	50%	50%	75%	Give and get expected of all Board members, based on a level that is personally significant.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
12%	26%	38%	12%	12%	0%

Transgender Law Center  
870 Market St., Room 822  
San Francisco, CA 94102  
415-865-0176  
www.transgenderlawcenter.org

Additional Locations

Los Angeles

**Senior Management Profile**

Legal Names

	Lowest	Average	Highest
Tenure with the organization	1.2	1.3	1.3
Compensation	\$55,141	\$59,653	\$64,166

Transgender Law Center - 501(c)(3)

Contact

**Paid Staff**

Masen Davis  
Executive Director  
masen@transgenderlawcenter.org

Total	Full-Time	Part-Time	Male	Female	Transgender
7	5	2	57%	43%	86%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	71%	29%	0%	0%

*Note: Board and staff data as of 1/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

1. **Organization History** - The Transgender Law Center (TLC), launched in 2002 as a fiscally sponsored project of the National Center for Lesbian Rights, is CA's 1st fully staffed, statewide transgender organization. We were created, with early support from NCLR, Pride Law Fund, and the Echoing Green Foundation, to respond to the overwhelming discrimination that transgender people and their families face in nearly every institution in CA. In the spring of 2005, we became an independent, tax-exempt organization.

Since our inception, TLC has provided individualized legal information to over 4,000 community members and their families, 500 of whom received more involved advocacy or representation. During that same period, TLC increased the community's capacity to respond to discrimination by holding over 275 transgender workshops providing legal information and advocacy training to more than 3,250 community members and their families, attorneys, government employees, social justice organizations and social service providers. TLC also produced 8 *Know Your Rights* pamphlets and fact sheets in English (7 of which are available in Spanish). In addition to their direct service and public education work, TLC has been involved in significant, socially transformative public policy victories. These include:

- Held 2 legislative hearings on transgender discrimination in healthcare that launched a statewide movement for legislative reform that created AB 1586, The Insurance Gender Discrimination Act, which went into effect on January 1, 2006.
- Helped San Francisco and Los Angeles Unified School Districts create and implement regulations around implementing the state's gender identity non-discrimination law.
- Created Peeing in Peace and co-created Beyond the Binary to help increase the ability of the community to respond to bathroom and school safety issues.
- Presented workshops to hundreds of attorneys and public administrators on legal issues ranging from safe schools, employment, healthcare access, family law/marriage rights, immigration, and culturally competent legal services for transgender clients. In support of this work, TLC created an extensive transgender law 101 practice guide and materials for family law and immigration attorneys.

**2009**

**Transgender Law Center**  
**Standard Annual Report**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

- Convened a coalition of more than 80 organizations to create Principles for Health Reform to inform the debate about healthcare reform in CA. This spurred conversations with the Governor's office and other elected officials about the need for health reform that addresses the needs of the LGBT community and resulted in the creation of the LGBT Health & Human Services Network (housed at Equality California).
- Launched the Transgender Equality Alliance and the annual statewide Transgender Leadership Summit in FY2006 to connect grassroots organizers and activists to statewide activism.
- Trained and mobilized CA organizations and activists to educate elected officials about the need for transgender-inclusive federal employment protections.

A variety of programs focused on institutional change have also addressed the needs of transgender people in public schools, county jails, health care systems, and the workplace. By working through multiple strategies of social change, TLC has helped build the capacity of the LGBT movement and transgender community to secure transgender civil rights while addressing the immediate legal needs of individual community members and sharing our best practices and lessons learned with partners around the US.

2. **Donor Turnover** - TLC has experienced challenges recruiting and retaining individual donors. This is related to a # of issues, including reduced earnings among early donors who have since come out as transgender and experienced workplace discrimination. Donor retention was especially difficult in 2008 due to increased joblessness related to the economic downturn, and the impact of CA's Proposition 8 and the election on our donor pool. TLC's new strategic planning process highlighted this as an important area of emphasis; the organization plans to retain a consultant to develop donor recruitment and retention plan for 2009-10.

**2009**

**The Trevor Project  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

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Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1998	National
<i>Fiscal Year</i>	<i>Type</i>
Aug - Jul	Issue
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,805,924	12
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

The Trevor Project is a non-profit endeavor established to promote acceptance for lesbian, gay, bisexual, transgender and questioning youth and to aid in crisis and suicide prevention among that group.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Impact:** Increase # of LGBTQ youth accessing program services.
  - Maintain operations and accreditation of Trevor Project's state-of-the-art, 24/7 crisis and prevention helpline by growing capacity to handle anticipated annualized increase in call volume from 25,000 to 40,000
  - Expand school workshop programming and implement online training
  - Execute annual evaluation of program services resulting in improvements in delivery of service
- Awareness:** Create greater acceptance of LGBTQ youth in schools and at home.
  - Create formal strategic partnerships with public school districts in NYC, LA, San Francisco, San Diego, Philadelphia, and DC
  - Actively engage religious communities in a dialogue for advice and support by participating in religious conferences and convenings
  - Promote family acceptance of LGBTQ youth through involvement with welcoming congregations and parental support groups
- Policies:** Advance comprehensive suicide prevention policies and mandates in schools using evidence-based research.
  - Double the # of states and municipalities that include sexual orientation in youth risk assessments
  - Expand and disseminate grassroots model for mandating suicide prevention training in schools from 2 to 12 states
- Expertise:** Position The Trevor Project as a respected and frequently-cited resource for national media and enhance its position as a 1-of-a-kind resource for LGBTQ youth and their families.
- Efficiency:** Engage more volunteers and donors to ensure long-term sustainability.
  - Establish cultural philosophy, "It is my privilege to solicit contributions for The Trevor Project," resulting in reliable, year-over-year increases in fundraising
  - Enhance portion of financial resources that goes to programmatic efforts to 75+%
  - Achieve geographic and gender parity on board of directors
  - Provide annual fundraising training and peer mentoring for all Board members
  - Provide meaningful involvement for all volunteers; engage more women and people of color increasing by 25%

One-year Key Planned Accomplishments for FY2010

- Answer 26,000+ Trevor Helpline calls from across US. Increase # of trained volunteer counselors from 140 to 200
- Double the # of Trevor Lifeguard School Workshops to 50 on both East and West Coasts
- Launch new Web site and increase number # of youth accessing TrevorSpace from 5,000 - 7,500
- Increase The Trevor Project's advocacy presence at the local, state and national level by participating in the LGBT HHS Network of California, the New Beginnings Initiative, the National Safe Schools Partnership, and the Federal LGBT Youth Policy Workgroup
- Increase individual contactable supporters through email, social networking and direct mail from 17,000 to 22,000

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

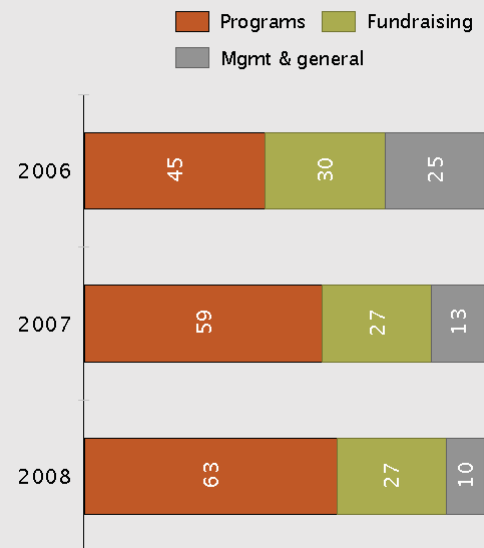
**Indicators of Financial Health & Efficiency**

<u>Ratios of Financial Health</u>	For the fiscal year ending July 31		
	2006	2007	2008
Liquidity ratio	4.3	13.9	4.2
Days of working capital	160	150	77
Working capital (\$000)	\$249	\$360	\$257
Average daily cash expense (\$000)	\$1.6	\$2.4	\$3.3
Fundraising expense (cash only) to raise \$1	\$0.28	\$0.24	\$0.28
Total revenue raised through development efforts (\$000)	\$636	\$1,021	\$1,181
<u>Indicators of Contributor Base</u>			
Number of individual donors who gave > \$35	305	497	1,296
Number of individual donors who gave > \$1,000	44	77	127
Donor turnover (gave > \$35 in prior FY & not this FY)	N/A	47%	42%
Number of individuals attending fundraising events (paid > \$100 per person)	526	602	820
Percent of total revenue from top 10 contributors	24%	32%	34%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 17,282	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Unaudited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$168,487	\$261,409	\$290,971
Net cash provided (used) by operating activities	88,233	91,018	-29,147
Net cash provided (used) by investing activities	4,689	-36,456	-35,311
Net cash provided (used) by financing activities	0	-25,000	0
Net increase (decrease) in cash	\$92,922	\$29,562	-\$64,458
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$261,409</u>	<u>\$290,971</u>	<u>\$226,513</u>

**2009**

**The Trevor Project**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Statement of Financial Position**

	<i>Unaudited</i> 2006	<i>Audited</i> 2007	<i>Audited</i> 2008
<b>Assets</b>			
Cash and cash equivalents	\$261,409	\$290,971	\$226,513
Investments	0	25,000	0
Other current assets	47,398	67,008	83,984
Net fixed assets	33,158	26,791	97,467
Other long-term assets	1,506	0	0
<b>Total Assets</b>	<b>\$343,471</b>	<b>\$409,770</b>	<b>\$407,964</b>
<b>Liabilities</b>			
Current liabilities	\$60,132	\$22,752	\$53,686
Long-term debt	25,000	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$85,132</b>	<b>\$22,752</b>	<b>\$53,686</b>
<b>Net Assets</b>			
Unrestricted	258,339	292,018	271,778
Temporarily restricted	0	95,000	82,500
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$343,471</b>	<b>\$409,770</b>	<b>\$407,964</b>

**Statement of Activities**

	<i>Unaudited</i> 2006		<i>Audited</i> 2007		<i>Audited</i> 2008	
<b>Support &amp; Revenue</b>						
Individual contributions	\$500,680	74%	\$390,792	37%	\$648,874	48%
Bequests	0	0%	0	0%	25,703	2%
Dues	0	0%	0	0%	0	0%
In-kind contributions	39,665	6%	35,409	3%	148,047	11%
Foundation contributions	89,700	13%	155,593	15%	162,000	12%
Corporate contributions/Non-event sponsorships	23,815	4%	51,845	5%	20,000	1%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	167,006	25%	565,270	53%	780,854	57%
Less costs of direct benefit to donors	-145,448	-21%	-142,967	-13%	-430,800	-32%
Net fundraising event income	\$21,558		\$422,303		\$350,054	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	1,729	0%	0	0%	0	0%
Other revenue	0	0%	3,371	0%	5,974	0%
<b>Total Revenue</b>	<b>\$677,147</b>		<b>\$1,059,313</b>		<b>\$1,360,652</b>	
<b>Expenses</b>						
Program services	276,551	45%	521,084	56%	756,705	54%
Fundraising	177,742	29%	248,342	27%	328,458	24%
Management and general	112,967	18%	107,974	12%	128,548	9%
Total cash expenses	\$567,260		\$877,400		\$1,213,711	
Non-cash expenses						
In-kind	39,665	6%	35,409	4%	148,047	11%
Depreciation	6,580	1%	10,315	1%	31,634	2%
Total non-cash expenses	\$46,245		\$45,724		\$179,681	
<b>Total Expenses</b>	<b>\$613,505</b>		<b>\$923,124</b>		<b>\$1,393,392</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$63,642</b>		<b>\$136,189</b>		<b>-\$32,740</b>	

**2009**

**The Trevor Project  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Board Members**

**Locations & Contact**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
30	80%	20%	0%	The board of directors has an annual give or get requirement of \$7,500.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	0%	80%	17%	3%	0%

The Trevor Project  
9056 Santa Monica Blvd.  
Suite 208  
West Hollywood, CA 90069  
310-271-8845  
www.TheTrevorProject.org

Additional Locations

New York City

Legal Names

The Trevor Project, Inc. -  
501(c)(3)

Contact

Charles Robbins  
Executive Director  
charles.robbs@thetrevorproject.org

**Senior Management Profile**

	<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization	1.5	1.8	2.0
Compensation	\$64,000	\$86,000	\$124,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
12	12	0	67%	33%	8%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
0%	25%	42%	33%	0%	0%

*Note: Board and staff data as of 9/9/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

- Financial Improvements** - The fundraising, administrative and programmatic expenses have changed significantly between FY2006 - FY2008 due to significant increases in staff and a board approved strategic plan to invest in programmatic efforts. As part of a 3 year plan to lower the fundraising and administrative expenses, the organization has increased its staff from 5 - 12, adding 5 programmatic staff positions between FY2007 - FY2009. The addition of opening two call centers, one in NYC and one in West Hollywood, CA, has also increased the investment in programmatic work during the 2 year time period.
- Board Designated Reserves** - The Board of Directors has designated \$200,000 of FY2008 unrestricted net assets as a contingency fund which requires Board of Director's approval prior to being used by the Organization. In FY2007, the reserve balance was \$125,000.

*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
2002	National
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Capacity building/ Research
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,750,000	16
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Advance sexual orientation (SO) and gender identity (GI) law and public policy in the US and internationally through rigorous, independent research and scholarship. Drawing on the intellectual and material resources of UCLA, the Williams Institute provides a national center for the interdisciplinary exploration of issues central to SO and GI law by scholars, judges, practitioners, advocates, and students.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

- Public Policy Research** - Produce and support production of public policy research that directly impacts current litigation, legislation, and public debate regarding LGBT issues.
- Judicial Training** - Continue to be the only provider of substantive trainings in the U.S. on SO and GI law and policy for state and federal judges, and other key court personnel.
- Legal Scholarship** - Produce and support production of legal scholarship that directly impacts current litigation, legislation, and public debate regarding LGBT issues.
- Leadership Development** - Provide meaningful and sustained support for scholars to begin and continue careers in SO and GI law and public policy.
- Public Debate** - Continue to be a respected and frequently-cited resource for national media on LGBT law and policy issues.

One-year Key Planned Accomplishments for FY2010

- Public Policy Research** - Complete 10+ major research projects, including identification of costs and economic impact of proposed state bans on same-sex adoption and foster care; impact of same-sex marriage on couples and the broader community, on occasion of the 5-year anniversary of marriage in MA; and impact of LGBT couples' rights on state economies and budgets.
- Judicial Education** - Conduct 5 to 6 SO and GI law and policy trainings for state and federal judges, bench officers and other key court personnel.
- Legal Scholarship** - Complete 50-state survey of employment discrimination by state employers against LGBT workers, which will strengthen the Congressional record in support of the Employment Non-Discrimination Act. Hold expert roundtables that include a series of discussions with both progressive and conservative scholars on reconciling LGBT Rights with 1st Amendment religious liberties. With the UCLA Law Review, host the 1st comprehensive conference on LGBT-related legal scholarship.
- Leadership Development** - Train 15+ young scholars on best practices for conducting LGBT-related public policy research and place 1+ law school graduates in teaching and/or research positions at academic institutions.
- Public Debate** - Earn 400+ media citations, including publishing 7+ op-eds in major news outlets.

2009

# The Williams Institute

## Standard Annual Report

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

### Key Accomplishments in FY2009

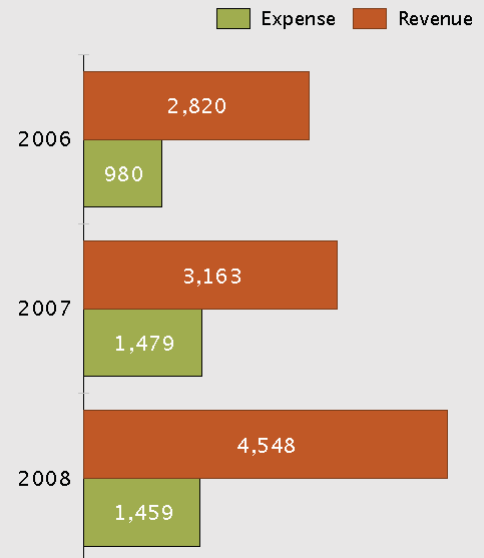
1. **Public Policy Research** - Published 27 studies addressing pressing policy issues related to SO. Reports included groundbreaking report on LGBT poverty; analyses of the economic impact of extending marriage rights to same-sex couples; an analysis of the impact of 5 years of marriage equality on the families and economy of MA; a series of reports on the cost to states of banning adoption by LGBT people or unmarried couples; an analysis of the cost of providing domestic partner benefits to federal employees; and updates of the demographics of the LGB population in CA (as demographic support for opposing Proposition 8). Completed 50+ Census Snapshots, detailing state-level demographic and economic characteristics of same-sex couples and their families. CA Snapshot included individual analysis of that state's Asian/Pacific Islander, Black, and Latino/a LGB populations.
2. **Judicial Education** - Conducted 5 SO and GI law and policy trainings for 200+ judges, bench officers, and other key court and law enforcement personnel in CA, WA, NV, FL and NY at the National Judicial College; WA State Annual Judicial Conference; National Center for Juvenile and Family Court Judges Program; and NY Gay Officers' Action League: 2009 Conference of LGBT Criminal Justice Professionals. Developed new curriculum to educate judges on domestic violence within the LGBT community.
3. **Legal Scholarship** - Completed 7 major legal scholarship projects, including 2 amicus briefs in CA same-sex marriage cases; an article on gays in the military (forthcoming in *Duke Journal of Gender Law and Policy*); an article on workplace bias (forthcoming in *Chicago-Kent Law Review*); an article on HIV Discrimination in LA health care services (forthcoming in *The Washington & Lee Journal of Civil Rights and Social Justice*); an article on the economic impact of same-sex marriage on the MD's budget (forthcoming in *University of Maryland Journal of Race, Religion, Gender, and Class*); an article addressing differences based on religion and SO (*Harvard Journal of Law & Gender*, summer 2009); and an article entitled "When New Governance Fails" (*Ohio State Law Journal*, spring 2009).
4. **Leadership Development** - 24 emerging scholars attended the Institute's 4th annual training in LGBT-related public policy research, expanded in 2009 to a 2-day seminar (most attendees were PhD students, along with a professor and a journalist). 60+ law students from 22 schools, 7 judges and 50 lawyers participated in the 5th Annual National Sexual Moot Court Competition on SO and GI Law. Doug NeJaime, the Williams Institute's 2007-09 Law Teaching Fellow, received a tenure-track position at Loyola Law School; Dean Spade, the 2008 Law Teaching Fellow, was awarded the Haywood Burns Chair at CUNY School of Law; Holning Lau, the 2007 Harvey S. Shipley Miller Law Teaching Fellow, is now an Associate Professor at the University of NC Law School; and Zachary A. Kramer, the 2004 Charles R. Williams Inaugural Law Teaching Fellow, joined Penn State University's Dickinson School of Law as an Assistant Professor.
5. **Public Debate** - Williams Institute scholars and their research were quoted in 480+ media stories, including in *The New York Times*, the *Los Angeles Times*, *USA Today* and *TIME Magazine* and on *National Public Radio*.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

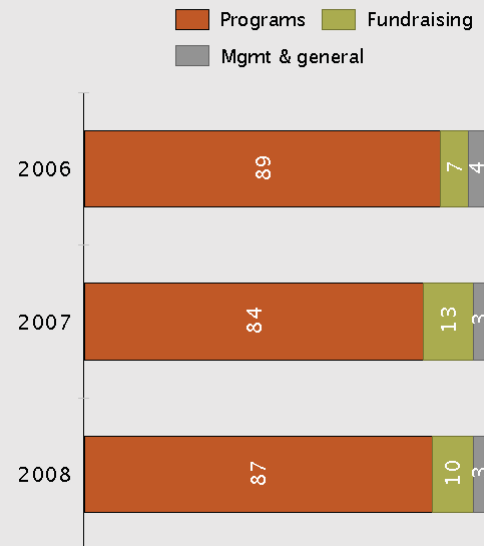
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	8.6	9.2	9.9
Days of working capital	318	292	231
Working capital (\$000)	\$846	\$1,138	\$864
Average daily cash expense (\$000)	\$2.7	\$3.9	\$3.7
Fundraising expense (cash only) to raise \$1	\$0.04	\$0.05	\$0.04
Total revenue raised through development efforts (\$000)	\$1,815	\$2,620	\$4,000
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	112	262	184
Number of individual donors who gave > \$1,000	37	104	85
Donor turnover (gave > \$35 in prior FY & not this FY)	48%	54%	48%
Number of individuals attending fundraising events (paid > \$100 per person)	276	599	602
Percent of total revenue from top 10 contributors	62%	52%	88%
Number of unique contactable names currently in fundraising and e-action databases		<i>Current</i> 4,500	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<i>Derivative</i> 2006	<i>Derivative</i> 2007	<i>Derivative</i> 2008
Cash and cash equivalent balance at beginning of year	\$498,657	\$690,368	\$914,240
Net cash provided (used) by operating activities	223,946	232,222	94,963
Net cash provided (used) by investing activities	-482,591	-207,739	-5,968,294
Net cash provided (used) by financing activities	450,356	199,389	5,945,287
Net increase (decrease) in cash	\$191,711	\$223,872	\$71,956
<b>Cash and Cash Equivalent Balances at End of Year</b>	<b>\$690,368</b>	<b>\$914,240</b>	<b>\$986,196</b>

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# The Williams Institute

## Standard Annual Report

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Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

### Statement of Financial Position

<u>Assets</u>	<u>Derivative</u> <u>2006</u>	<u>Derivative</u> <u>2007</u>	<u>Derivative</u> <u>2008</u>
Cash and cash equivalents	\$690,368	\$914,240	\$956,196
Investments	2,093,975	2,293,364	8,238,651
Other current assets	235,750	450,167	690,667
Net fixed assets	38,009	34,745	47,303
Other long-term assets	5,431,174	6,484,765	3,295,932
<b>Total Assets</b>	<b>\$8,489,276</b>	<b>\$10,177,281</b>	<b>\$13,228,749</b>
<u>Liabilities</u>			
Current liabilities	\$80,124	\$83,783	\$96,890
Long-term debt	0	0	0
Other long-term liabilities	0	0	0
<b>Total Liabilities</b>	<b>\$80,124</b>	<b>\$83,783</b>	<b>\$96,890</b>
<u>Net Assets</u>			
Unrestricted	614,221	476,887	511,329
Temporarily restricted	221,576	696,017	400,406
Permanently restricted	7,573,355	8,920,594	12,220,124
<b>Total Liabilities and Net Assets</b>	<b>\$8,489,276</b>	<b>\$10,177,281</b>	<b>\$13,228,749</b>

### Statement of Activities

<u>Support &amp; Revenue</u>	<u>Derivative</u> <u>2006</u>		<u>Derivative</u> <u>2007</u>		<u>Derivative</u> <u>2008</u>	
Individual contributions	\$381,684	14%	\$902,525	29%	\$1,845,458	41%
Bequests	672,540	24%	542,843	17%	625,378	14%
Dues	0	0%	0	0%	0	0%
In-kind contributions	21,491	1%	43,000	1%	84,334	2%
Foundation contributions	650,000	23%	835,000	26%	802,500	18%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	93,079	2%
Government funding	292,629	10%	19,500	1%	216,917	5%
Program income	5,890	0%	620	0%	12,950	0%
Fundraising event income	154,700	5%	308,234	10%	356,110	8%
Less costs of direct benefit to donors	-16,800	-1%	-31,206	-1%	-23,755	-1%
Net fundraising event income	\$137,900		\$277,028		\$332,355	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	628,233	22%	475,842	15%	535,192	12%
Other revenue	30,000	1%	67,130	2%	0	0%
<b>Total Revenue</b>	<b>\$2,820,367</b>		<b>\$3,163,488</b>		<b>\$4,548,163</b>	
<u>Expenses</u>						
Program services	864,743	87%	1,238,021	84%	1,179,583	81%
Fundraising	69,080	7%	143,956	10%	147,731	10%
Management and general	36,073	4%	42,552	3%	36,786	3%
Total cash expenses	\$969,896		\$1,424,529		\$1,364,100	
Non-cash expenses						
In-kind	14,641	1%	43,000	3%	84,334	6%
Depreciation	6,532	1%	11,614	1%	10,449	1%
Total non-cash expenses	\$21,173		\$54,614		\$94,783	
<b>Total Expenses</b>	<b>\$991,069</b>		<b>\$1,479,143</b>		<b>\$1,458,883</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>\$1,829,298</b>		<b>\$1,684,345</b>		<b>\$3,089,280</b>	

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**The Williams Institute**  
**Standard Annual Report**

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

**Board Members**

**Locations & Contact**

Total	Male	Female	Transgender	Fundraising Requirements	
30	53%	47%	0%	None	
African American/Black	Asian/Pacific Islander	Caucasian	Hispanic/Latino(a)	Native American	Other
17%	13%	67%	3%	0%	0%

The Williams Institute  
UCLA Law School, Box 951476  
Los Angeles, CA 90095  
310-794-5279  
www.law.ucla.edu/williamsinstitute

Additional Locations

**Senior Management Profile**

None

Legal Names

The UCLA Foundation, The Williams Institute - 501(c)(3)

Contact

Brad Sears  
Executive Director  
sears@law.ucla.edu

	Lowest	Average	Highest
Tenure with the organization	2.0	4.7	8.0
Compensation	\$45,000	\$73,178	\$111,000

**Paid Staff**

Total	Full-Time	Part-Time	Male	Female	Transgender
16	10	6	50%	50%	0%
African American/Black	Asian/Pacific Islander	Caucasian	Hispanic/Latino(a)	Native American	Other
6%	13%	75%	6%	0%	0%

Note: Board and staff data as of 6/30/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.

**Organization's Notes and Advisories**

- Financial Statements** - The Williams Institute is a research center at the UCLA School of Law, and as such, UCLA provides accounting and other services to the Institute. While the university does not provide full financial statements specifically for the Institute, the financial statements in this report are derived from audited financial information provided by UCLA.
- UCLA Relationship** - UCLA charges the Williams Institute gift fees on all contributions and an indirect cost allocation on all grants. In exchange, UCLA provides the Institute with support in the following areas without charge: accounting, development, human relations, endowment and investment management, facilities, cleaning, mailroom, information technology, audio/visual, press and publicity, graphic design, and event coordination.
- Endowment** - The Williams Institute is working to build its endowment and has received several testamentary gifts and other pledges which are permanently restricted by the donors. Testamentary gifts to the Institute are accompanied with a UCLA gift agreement creating a corresponding irrevocable binding claim on the donor's estate. Per UCLA policy, testamentary gifts are recorded as long-term pledges receivable. Accordingly, the balance of the testamentary gifts and other pledges receivable are presented in the above Statement of Financial Position as "Other long-term assets" and are recorded at their present value. The current portion of pledges receivable are recorded as "Other current assets." Revenue from testamentary gifts are recorded in the Statement of Activities as "Bequests" and pledges are recorded as "Individual contributions," both of which are also recorded at their net present value at the time of the gift.
- Faculty Advisory Committee** - Since the Williams Institute is part of UCLA School of Law, it does not have an independent board of directors. The demographic information reported above is for the Williams Institute's Faculty Advisory Committee. This committee is comprised of faculty members from academic institutions who provided expert advice and oversight for the Institute's legal scholarship and public policy work. Their responsibilities do not include assisting the Institute with fundraising, although some members do contribute to the Institute and assist with fundraising efforts.
- Working Capital** - Working capital (defined as cash and cash equivalents plus investments plus other current assets minus current liabilities) is further reduced by the amount of permanently restricted net assets held as cash or investments. All funds in the investments line item are permanently restricted and have been removed in order to determine days of working capital and liquidity ratio on page 3. Earnings on investments can be spent by the Institute without restriction and are included in the cash balances. Accordingly, the Institute has an on-going source of unrestricted income from the investments that contributes toward its liquidity.



**2009**

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1988	Southern Arizona
<i>Fiscal Year</i>	<i>Type</i>
Jul - Jun	Cmty Ctr
<i>2009 Budget</i>	<i>Total Paid Staff</i>
\$1,200,000	6
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

Promote the freedom, equality, safety and well-being of LGBT people in Southern AZ.

**Key Planned Accomplishments**

**Note:** For organizations whose fiscal year ends very early in the calendar year, this year's SAR will skip forward to the most current goals and objectives (FY2010, rather than FY2009 for the other organizations). The previous year's accomplishments section will show FY2009 accomplishments for these organizations (FY2008 for the other organizations).

Five-year Key Planned Accomplishments for FY2010-2014

1. Create welcoming spaces and community connections.
2. Expand the definition of family.
3. Improve access to quality healthcare.
4. End violence, discrimination, and oppression.
5. Create a sustainable organization.

One-year Key Planned Accomplishments for FY2010

1. Provide community outreach, education, and free and confidential support services, in English and Spanish, to LGBT victims and survivors of domestic violence, hate crimes, and harassment.
2. Offer safe space where Latino LGBT people can celebrate heritage and LGBT pride and create community via meetings, events, educational sessions, and social events.
3. Engage active LGBT seniors (age 55+) and allies to create social and educational opportunities, provide support networks for older LGBT people, train health care providers about LGBT elders' needs, and produce a monthly newsletter for LGBT seniors.
4. Provide a welcoming child-centered space and family-friendly activities for LGBT families with children to gather and connect. Offer community-based listserv and networking opportunities for LGBT and allied families.
5. Provide support groups, outreach, homeless services, social activities, educational and career enrichment, and leadership training for LGBT youth and straight allies aged 13 to 23. Eon Youth Center provides a safe, substance-free, space for social interaction, support groups, sexual health information and testing, and activism training. Its comprehensive, youth-led services include sexual violence prevention, HIV and substance abuse prevention and homeless youth programs; a drop-in lounge; a leadership development program, and a youth activism program.
6. Offer information, support services and social opportunities for transgender people and their families. Provide training for businesses, health care agencies, and service providers to educate them about issues affecting the transgender community and to ensure that transgender and gender-variant people receive appropriate services with dignified respectful treatment.
7. Provide meeting space for LGBT/allied groups, a David Bohnett CyberCenter, a 5000-book and video lending library, a lounge, and Infolink (up-to-date, accurate information on a huge range of LGBT-friendly services, including nearly 1,000 realtors, businesses, and health care providers).

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Key Accomplishments in FY2009

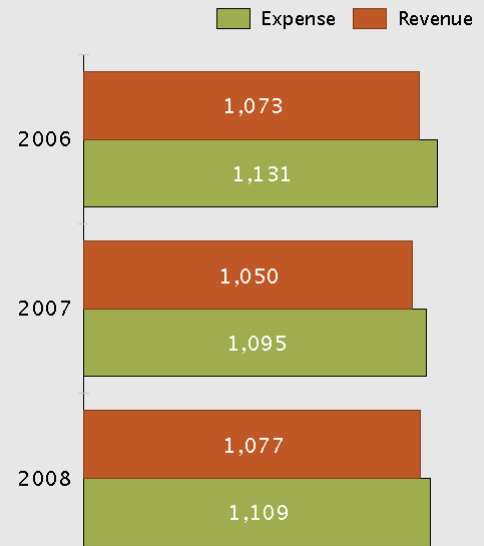
1. Provided crisis intervention and advocacy to 310 survivors of violence (125 of whom had experienced domestic violence, 34 sexual violence, 22 a hate crime, 81 harassment and/or discrimination, and 48 other forms of violence). Educated 690 service providers, law enforcement agents, and community members.
2. Provided support and social activities for 115 seniors and offered 49 senior social activities and events.
3. Hosted social activities, community forums and workshops for LGBT families.
4. Hosted 8,023 drop-in visits by 300+ youth, 97% of whom report that their involvement with Eon Youth Center has given them the information and tools they need to make healthy choices. Eon staff educated 627 people about LGBT issues.
5. Provided education, training, and information about transgender persons' needs to 830 service providers, mental health professionals, employers, and other community members; provided support to 817 transgender and allied people; and, hosted 182 meetings, support groups, social activities, and special events for transgender and allied people.
6. Logged about 3,000 user sessions in the CyberCenter, 1,500 check-outs from the library, 2,752 in-person information referrals and 7,933 information retrievals through Infolink.

Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview

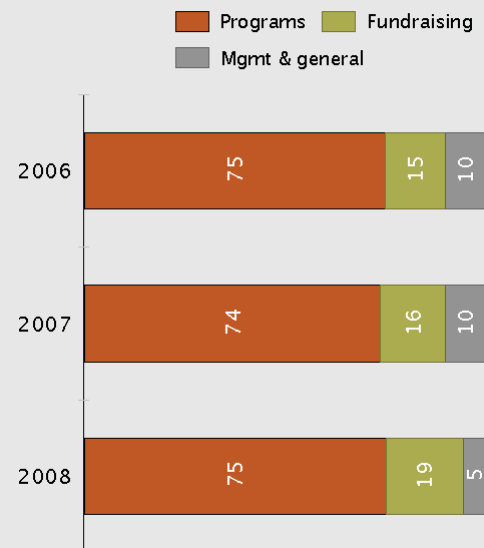
**Indicators of Financial Health & Efficiency**

<i>Ratios of Financial Health</i>	For the fiscal year ending June 30		
	2006	2007	2008
Liquidity ratio	2.1	1.4	0.8
Days of working capital	115	96	80
Working capital (\$000)	\$353	\$285	\$235
Average daily cash expense (\$000)	\$3.1	\$3.0	\$3.0
Fundraising expense (cash only) to raise \$1	\$0.16	\$0.17	\$0.18
Total revenue raised through development efforts (\$000)	\$1,069	\$1,039	\$1,074
<i>Indicators of Contributor Base</i>			
Number of individual donors who gave > \$35	869	876	876
Number of individual donors who gave > \$1,000	108	84	84
Donor turnover (gave > \$35 in prior FY & not this FY)	50%	51%	51%
Number of individuals attending fundraising events (paid > \$100 per person)	N/A	1,100	1,100
Percent of total revenue from top 10 contributors	55%	12%	12%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 11,850	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2006</u>	<u>Audited 2007</u>	<u>Audited 2008</u>
Cash and cash equivalent balance at beginning of year	\$217,141	\$92,817	\$30,838
Net cash provided (used) by operating activities	-85,559	-19,339	-42,562
Net cash provided (used) by investing activities	-76,765	-4,640	-12,000
Net cash provided (used) by financing activities	38,000	-38,000	56,000
Net increase (decrease) in cash	<u>-\$124,324</u>	<u>-\$61,979</u>	<u>\$1,438</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$92,817</u>	<u>\$30,838</u>	<u>\$32,276</u>

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*Please see attached SAR Quick User's Guide and separate 2009 LGBT Movement Financial and Operating Overview*

**Statement of Financial Position**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>
<b>Assets</b>					
Cash and cash equivalents	\$92,817		\$30,838		\$32,276
Investments	74,182		69,182		79,468
Other current assets	265,289		254,791		258,314
Net fixed assets	22,188		26,178		35,409
Other long-term assets	49,534		58,726		66,977
<b>Total Assets</b>	<b>\$504,010</b>		<b>\$439,715</b>		<b>\$472,444</b>
<b>Liabilities</b>					
Current liabilities	\$79,490		\$70,121		\$134,874
Long-term debt	0		0		0
Other long-term liabilities	0		0		0
<b>Total Liabilities</b>	<b>\$79,490</b>		<b>\$70,121</b>		<b>\$134,874</b>
<b>Net Assets</b>					
Unrestricted	364,504		155,012		82,793
Temporarily restricted	60,016		214,582		254,777
Permanently restricted	0		0		0
<b>Total Liabilities and Net Assets</b>	<b>\$504,010</b>		<b>\$439,715</b>		<b>\$472,444</b>

**Statement of Activities**

	<i>Audited</i> <u>2006</u>		<i>Audited</i> <u>2007</u>		<i>Audited</i> <u>2008</u>	
<b>Support &amp; Revenue</b>						
Individual contributions	\$385,019	36%	\$348,330	33%	\$342,462	32%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	0	0%	0	0%	14,820	1%
Foundation contributions	103,142	10%	106,536	10%	87,902	8%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	502,035	47%	524,872	50%	544,620	51%
Program income	926	0%	3,867	0%	2,565	0%
Fundraising event income	116,403	11%	109,930	10%	130,677	12%
Less costs of direct benefit to donors	-37,940	-4%	-50,452	-5%	-46,970	-4%
Net fundraising event income	\$78,463		\$59,478		\$83,707	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	3,940	0%	7,231	1%	775	0%
Other revenue	-824	-0%	0	0%	0	0%
<b>Total Revenue</b>	<b>\$1,072,701</b>		<b>\$1,050,314</b>		<b>\$1,076,851</b>	
<b>Expenses</b>						
Program services	838,153	74%	798,749	73%	821,689	74%
Fundraising	166,877	15%	177,534	16%	197,437	18%
Management and general	111,281	10%	108,465	10%	59,512	5%
Total cash expenses	\$1,116,311		\$1,084,748		\$1,078,638	
Non-cash expenses						
In-kind	0	0%	0	0%	14,820	1%
Depreciation	15,117	1%	9,788	1%	15,417	1%
Total non-cash expenses	\$15,117		\$9,788		\$30,237	
<b>Total Expenses</b>	<b>\$1,131,428</b>		<b>\$1,094,536</b>		<b>\$1,108,875</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$58,727</b>		<b>-\$44,222</b>		<b>-\$32,024</b>	

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**Board Members**

<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>	<i>Fundraising Requirements</i>	
17	35%	65%	6%	Each board member asked to raise \$2,000 per year, but this is not required.	
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
6%	0%	82%	12%	0%	0%

**Locations & Contact**

Wingspan  
430 E. 7th St.  
Tucson, AZ 85705  
520-624-1779  
www.wingspan.org

Additional Locations

None

Legal Names

Wingspan - 501(c)(3)

Contact

Cynthia Garcia  
President, Board of Directors  
board@wingspan.org

**Senior Management Profile**

	<u>Lowest</u>	<u>Average</u>	<u>Highest</u>
Tenure with the organization	5.5	5.5	5.5
Compensation	\$40,000	\$52,500	\$65,000

**Paid Staff**

<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Male</i>	<i>Female</i>	<i>Transgender</i>
6	5	1	50%	50%	17%
<i>African American/Black</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic/Latino(a)</i>	<i>Native American</i>	<i>Other</i>
17%	0%	67%	17%	0%	0%

*Note: Board and staff data as of 8/1/09. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.*

**Organization's Notes and Advisories**

For additional information please contact Wingspan or visit our website at [www.wingspan.org](http://www.wingspan.org).



*Please also see accompanying 2009 LGBT Movement Financial and Operating Overview*

### Sources of Data

All data is self-reported. Seventy four percent of participants have Audited statements, as indicated at the top of their Statement of Financial Position. Other possibilities are Reviewed statements (limited independent review), Derivative statements (drawn from audited statements of a parent entity), and Unaudited statements (official internal statements with no independent review).

SAR includes data only for full fiscal years; data is not shown for years in which an organization operated for less than 12 full months. Each organization's data is for its own fiscal year (e.g., Jul – Jun), as shown at the top right of page 1. If an organization is composed of multiple legal entities [e.g., 501(c)(3) and 501(c)(4)], its SAR combines data from all entities. Readers may obtain a Combining Schedule from the organization.

### Standardization of Accounting Definitions and Methods

MAP provided participants with standardized accounting definitions and implementation guidance from respected nonprofit accounting texts (e.g., *FASB SFAS Nos. 116 & 117*, *AICPA Audit and Accounting Guide for Not-for-Profit Organizations*, and *PPC's Guide to Nonprofit Contributions and Expenses*). All participants agreed to standardized treatment of 10 accounting items: individual, in-kind, foundation and corporate contributions; bequests; government funding; gross and net fundraising event income; and depreciation and in-kind expenses.

**MAP did not attempt to standardize organizations' methods of allocating functional expenses (e.g., salaries, direct mail costs, and overhead). Variability in this regard is a significant issue as FASB<sup>1</sup> allows substantial discretion.**

### Indicators of Financial Health & Efficiency

**Liquidity ratio** indicates how many times cash and investments were on hand to cover current obligations at fiscal year end. A liquidity ratio of <1.0 may indicate financial difficulty (i.e., more current obligations than means to pay them). A ratio tending toward 1.0 indicates little cash in reserve at that moment in time. [Formula: (cash and cash equivalents + investments – permanently restricted funds held as cash and/or investments) ÷ current liabilities]

**Days of working capital** indicates how many days an organization could continue normal operations without infusion of additional cash. Less than 30 days could portend a cash crunch. Over 365 days may suggest that the organization could “loosen up” and spend more toward its mission. [Formula: working capital ÷ average daily cash expenses]

**Working capital** is the excess of current assets (cash and other current receivables) over current liabilities (account payables and the current portion of debt). It is a measure of both the amount of funds needed to carry on regular operations and of liquidity (ability to handle a financial shock). [Formula: cash and cash equivalents + investments + other current assets – permanently restricted funds held as cash, investments, and/or other current assets – current liabilities]

**Average daily cash expense** is used to calculate days of working capital (see above). It equals total annual expenses, less those expenses not involving cash (i.e., depreciation and in-kind expenses like pro bono legal services), divided by 365 days.

**Fundraising expense (cash only) to raise \$1** looks at the organization's total out-of-pocket cost to raise that year's total revenue that stems from development efforts (i.e., total revenue less investment gains, service fees, previous bequests, and other items not attributable to current fundraising efforts). Note that two major charity watchdogs – AIP and BBB<sup>2</sup> – give failing grades to organizations that spend >\$0.35 to raise \$1.

The **Expense percentage graph** is based on total cash and non-cash expenses as identified on the organization's Statement of Functional Expenses (one of the audited financial statements required for nonprofit voluntary health and welfare organizations). *Note that these figures vary according to the organization's allocation method.*

- **Program expense** is that portion of total expense that went directly to fulfilling the organization's mission. AIP considers <60% program expense failing; BBB considers <65% failing.<sup>2</sup>
- **Fundraising expense** is that portion of total expense that went back into revenue generation. AIP and BBB consider >35% fundraising expense failing.<sup>2</sup>
- **Management & general expense** is that portion of total expense that went to administration and overhead.

### Summarized Financial Statements

1) The **Statement of Cash Flows** indicates the organization's success at raising and managing cash and its financial viability.

- **Cash Provided (Used) by Operating Activities** is the cash provided by day-to-day operations and includes everything not listed in the two other categories below.
- **Cash Provided (Used) by Investing Activities** shows cash used to purchase investments or fixed assets, and/or cash provided from the sale of investments or fixed assets.
- **Cash Provided (Used) by Financing Activities** shows the net of amounts borrowed and used to pay back debt.

<sup>1</sup> FASB = The Financial Accounting Standards Board.

<sup>2</sup> AIP = American Institute of Philanthropy ([www.charitywatch.org](http://www.charitywatch.org)), BBB = Better Business Bureau Wise Giving Alliance ([www.give.org](http://www.give.org)). Their benchmarks cited here are general guides. More comprehensive and nuanced guidelines appear on their websites.

*Please also see accompanying 2009 LGBT Movement Financial and Operating Overview*

### Summarized Financial Statements *(continued)*

2) The **Statement of Financial Position** is the organization's balance sheet. It shows the book value of the organization (i.e., what the organization *owned* combined with what it *owed* at fiscal year end).

- **Assets** are things that the organization owns and that have future economic value that can be measured in dollars:
  - **Cash and cash equivalents** – Checking and savings account balances plus any other cash equivalents.
  - **Investments** – Investment and marketable securities balances.
  - **Other current assets** – Grants receivable, pledges receivable, prepaid expenses, current portion of long-term receivables, etc.
  - **Net fixed assets** – Land, buildings, leasehold improvements, equipment, furniture, net of accumulated depreciation.
  - **Other long-term assets** – Long-term receivables (net of current portion), security deposits, etc.
- **Liabilities** are the organization's obligations. Liabilities can be thought of as the sources of the organization's assets (along with Net Assets, see below), as well as claims against its assets:
  - **Current liabilities** – Accounts payable, accrued expenses, deferred revenue, short-term notes payable, portion of long-term debt due within 12 months.
  - **Long-term debt** – Outstanding debt, net of portion due within 12 months.
  - **Other long-term liabilities** – All other long-term liabilities, net of any portion due within 12 months.
- **Net Assets** are also called the entity's "book value," because they are the residual (leftover) of what is owned (assets) after deducting what is owed (liabilities):
  - **Unrestricted net assets** – Neither permanently restricted nor temporarily restricted by donor-imposed stipulations.
  - **Temporarily restricted net assets** – Results from contributions limited by donor-imposed stipulations that expire with the passage of time or by certain actions of the entity.
  - **Permanently restricted net assets** – Results from contributions limited by donor-imposed stipulations that can neither expire with the passage of time nor can be fulfilled or otherwise removed by actions of the entity. The entity must generally maintain these assets in perpetuity.

3) The **Statement of Activities** is analogous to the income statement of a business. It captures revenues, expenses, gains, and losses:

#### Support & Revenue

- **Individual contributions** – Unrestricted or restricted contributions and pledges (promises to give) from individuals.
- **Bequests** – Gifts from deceased individuals via wills.
- **Dues** – Chapter dues and other amounts collected from affiliates (chapters or member organizations) in an exchange transaction (i.e., for economic value received).
- **In-kind contributions** – Gifts-in-kind and certain contributed services recorded at their fair value.
- **Foundation contributions** – Unrestricted and/or restricted contributions from foundations (grants).
- **Corporate contributions/Non-event sponsorships** – Unrestricted and/or restricted contributions from corporations in the form of grants or organization-wide, non-event sponsorships. This category does not include corporate sponsorships for fundraising events (see Fundraising event income below).
- **Government funding** – Amounts from federal, state or local government agencies (includes cost reimbursement and fee-for-service contracts).
- **Program income** – Revenue received from program service activities (e.g., conference/seminar fees, service fees, etc.).
- **Fundraising event income** – Special events hosted for the purpose of raising contributions. The costs of any benefits received by attendees are recorded separately as "Less cost of direct benefit to donors."
- **Merchandise sales** – Merchandise revenues, net of cost of goods sold.
- **Net investment income** – Realized/unrealized gains (losses), dividends and interest income, net of investment expenses.
- **Other revenue** – Other revenue not categorized above.

#### Expenses

- **Program services** – Direct and indirect costs for all program activities which serve to fulfill the organization's mission.
- **Fundraising** – Direct and indirect costs related to activities to induce potential donors to contribute to the organization.
- **Management and general** – Costs for essential activities of the organization that relate to its overall direction (e.g., accounting, budgeting, office management, personnel, etc.), but not identifiable to a program or fundraising activity.
- **In-kind expenses** – The portion of in-kind contributions (revenue) that results in goods or services that would be expensed. (Note: some in-kind contributions of goods (e.g., a donation of computer equipment) might be capitalized and so not included as an expense.)
- **Depreciation** – Annual depreciation expenses for the organization's fixed assets.

If an organization was able to operate within its revenues for the year, the bottom line of its Statement of Activities will show a surplus (i.e., a positive Change in Net Assets).





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